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Foreign Commerce WEEKLY

Vol. XV, *No.* 2 *April* 8, 1944

WOOD-PULP MILL, NORTHERN SWEDEN

Foreign Commerce Weekly

Statutory Functions "The Bureau of Foreign and Domestic Commerce . . . . to foster, promote, and develop the foreign and domestic commerce of the United States." [*Law creating the Bureau, Aug. 23, 1912 [37 Stat. 408].*]

Issued by the UNITED STATES DEPARTMENT OF COMMERCE, JESSE H. JONES, *Secretary*

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Annual Subscription: Domestic, $4.50; Foreign, $7.90; Single copy, 10 cents. Make remittances payable to the Superintendent of Documents and mail direct to that official, Government Printing Office, Washington 25, D. C.

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PUBLISHED WITH THE APPROVAL OF THE DIRECTOR OF THE BUDGET (42 J. C. P.)

Commercial Intelligence Plays Major Wartime Role

By E. E. SCHNELLBACHER, *Chief, Division of Commercial and Economic Information, Bureau of Foreign and Domestic Commerce*

TWENTY YEARS AGO the Department of Commerce adopted a motto, "The most perishable commodity in the world today is commercial intelligence." The past five years have served again to demonstrate the truth of that statement. The opportunities being created by the many changes that are taking place further emphasize the obligation of business and Government to maintain current commercial intelligence.

The commercial-intelligence work in Government has largely followed the pattern or the methodology developed by American business. The type of report and the utilization of the material have constituted a cooperative activity between Government and business, in which Government produced a product that met the needs of the American businessman, and still served the public interest.

The commercial-intelligence reporting service of the Department of Commerce came into being at the close of World War I. Within a few months after the Armistice, most of the people concerned with wartime controls had left Washington. In a temporary building were located the records relating to war trade, and to that building were sent several clerks of the Bureau of Foreign and Domestic Commerce.

How System Evolved

There were 3,014 names on the Trading With the Enemy List of the United States at the close of that war. These files were removed to the Department of Commerce, where, after the elimination of that part of the material which contained specific references to political activities, there remained about 17,000 reports describing the commercial aspects of firms and individuals engaged in business in foreign countries.

This was the nucleus of the World Trade Directory, the name of which was determined by an advisory committee representing business and Government. The design of the individual report was intended to give a picture of the sales organization of foreign firms and their qualifications for handling United States merchandise.

Instructions were sent to the Foreign Service Officers for the purpose of revising these 17,000 reports, and lists of names of additional firms were sent to the field for the purpose of obtaining new information.

These lists were provided by banks which maintained foreign credit files, trade organizations such as the Foreign Credit Interchange Bureau, and some trade associations which worked closely with foreign traders. Many of the names selected for reports were taken from the lists of agents and distributors in foreign countries that had been compiled in earlier years by commercial agents.

Thereafter, the World Trade Directory developed largely on the basis of requests received from United States foreign traders. By 1940 the commercial-intelligence files listed more than 1,000,000 names of foreign firms and individuals, and there were detailed reports on 650,000.

Steady Flow of Data

For many years there was a steady flow of information into these files from United States foreign traders, who augmented the basic reports with records of their own trade experience. They also provided the names of their foreign agency and distributorship connections.

For example, it was the custom of exporters of automotive equipment to utilize the Commercial Intelligence Division as the center to which all foreign connections were reported so that there would be no question of negotiating with prospective distributors who already held competitive lines. Similar arrangements were worked out in the rubber-manufactures, machinery, and drug industries.

In addition to maintaining specific information on particular firms, there was also a type of industry report, which incorporated much of the foregoing information. This industry report served to show the place of a particular industry in the economy of the country under consideration and the extent of the participation of the United States in that field, whether or not the goods were made locally or manufactured in the United States and exported to the foreign country.

From this type of report, today's war agencies have been able to get quickly an accurate knowledge of the available channels of distribution and the flow of goods in respect to practically every item that enters into international trade.

Invaluable Source

With the outbreak of the war in Europe in 1939, the peacetime commercial-intelligence files were the most prolific source of information for all types of intelligence in which the human equation is a factor. This commercial intelligence became the hub for planning the application of trade controls in such a way that the enemy would be hit quickly and hard through economic warfare.

Today there are 15,102 names of firms and individuals on the Proclamed List of Certain Blocked Nationals. The collection of specific information in the other American Republics and the neutral countries of Europe has been accelerated by the needs of the war agencies for the application of export controls. There has been added to the staffs of our Missions abroad a large number of people who are gathering facts for use in dealing with questions of consignee control, commodity requirements, and general economic conditions.

This material is made available to the Department of Commerce, and practically all of it has been made an integral part of our commercial-intelligence service. Some of it cannot be released, for security reasons, but there it is, and it will be available just as soon as conditions make it open for dissemination.

Nevertheless, much of this commercial intelligence is now available in one form or another insofar as the Western Hemisphere is concerned. We are receiving about 300 current World Trade Directory reports each week, and we are abstracting from confidential reports information which is being made part of our commercial and economic material needed by American exporters and importers.

Sterilizing Axis Spear Heads

We are keeping close tab on changes in the business structures of firms which have undergone nationalization, vesting, or reorganization in a number of coun-

NOTE.—This article is based on Mr. Schnellbacher's address before one of the sessions of the recent annual meeting of the Export Managers Club of New York.

tries. For example, in Mexico and Brazil, real progress has been made toward the permanent elimination of Axis interests. These two countries are proceeding toward goals similar to that sought by our own Alien Property Custodian in order that the Axis spearheads of economic penetration may be sterilized.

Some very definite developments and opportunities result from these programs. Certain of the firms which have been vested are engaged in the production and distribution of commodities vital to the economies of those countries. Can foreign sources of supply care for the needs of the countries' own nationals? Decisions must be reached as to whether these entities should be continued under national supervision.

To the extent that these spearheads are sterilized, the need for the maintenance of controls in respect to our own business firms is minimized.

Judicious Procedure Vital

Commercial intelligence should be able to point out the weaknesses as well as the strengths inherent in these developments. In some cases, the elimination of the undesirable political elements has essentially eliminated the management and best commercial brains in these firms. Technicians, accountants, and specialists are often removed because of their political characteristics, leaving some firms almost empty shells.

If it has been decided that the firm must be continued as an integral part of the local economy, commercial intelligence should point out to American firms the extent to which they can cooperate in the rebuilding of these firms to the mutual advantage of those countries and our own.

I have never accepted the theory that German firms in Latin America were strong, substantial houses merely because they were German. We lost sight of the fact that many of these houses were strong because they handled high-quality American merchandise and were aided in many ways by American technique and other support. We can afford similar aid for these firms now under the operation of nationals of those countries, without having to face the fact that 20 years' relations will have to be severed. We can build now for a future which has no limits in point of time.

New Firms Come Into Being

It is quite amazing to see the number of "unknown" firms that are coming into being. There are several hundred inquiries going from Washington to the foreign field each week for the purpose of obtaining information on firms and individuals heretofore unknown in the commercial registers. These may be generally regarded as new businesses of several kinds. Obviously, some of them are firms seeking to import goods in short supply in the mistaken belief that, because there is a demand for such goods, there is room for additional firms in the field.

Many of these organizations will cease to exist as soon as adequate supplies begin flowing through established channels adequate to take care of the requirements of the markets.

Some May Prosper

In addition, however, there are firms which have come into being for the purpose of producing goods which are currently unobtainable from abroad or for which obtainable amounts are inadequate. This is typical of the situation when necessities are in short supply. Some of these newcomers may get a foothold and prosper. They may seek the introduction of tariffs for protective purposes. There are indications that protection for these infant industries is being "pressured" in several countries, and undoubtedly some of them will be preserved through that means.

It is very important that commercial intelligence be obtained and maintained on these youthful entrants into the commercial picture, so that their growth may be followed and the turning points in their lives known, whether they mature or die of premature old age.

Watch Distributors' Status!

Another type of commercial intelligence, the burden of which probably rests as much on foreign traders as on Government, is the continued collection of information on the month-to-month status of U. S. concerns' existing distributors. Many are coming through these difficult times on a bare subsistence basis, and our exporters should keep themselves informed in respect to the foreign firms' inventory, prices of stocks on hand, variations in prices between, say, 1939 and 1944, and the other factors which a credit man must keep in mind in order to maintain well-rounded information on which to base credit risks.

Preserve Free-Enterprise Tools

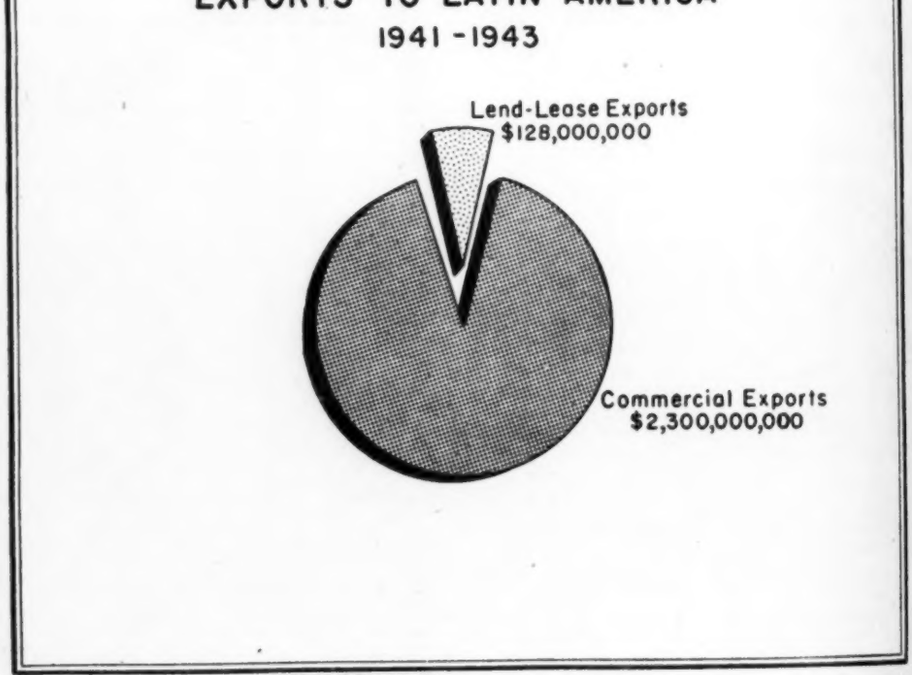
The history of American credit interchange is one of the notable and admirable attributes of our commercial life—a feature which, one feels sure, will continue to develop in the same splendid manner. The present writer does not believe that Government commercial intelligence should seek to supersede the splendid job that is being done through the instrumentality of shared experience and the exchange of credit information which has always been the support of our export technique. During these difficult times, however, it seems necessary that Government assume the responsibility of filling the gaps and making available the kind of information which private enterprise cannot obtain because of the very restrictions that must, unavoidably, be placed on private enterprise during wartime.

Putting it another way, Government commercial intelligence should function during wartime with a view to preserving for free enterprise the tools which the private firms can reassume in the maintenance of their own function in the post-war era.

Adjustment to New Factors

Our job from now on is to maintain fresh files on local firms which are best suited to handle new lines of American goods. We shall have to revise or delete many names of pre-war firms which are no longer available as outlets for American goods. Other firms which have taken on additional representations will not be open to new lines. To a consider-

(Continued on p. 27)



FOREIGN ECONOMIC ADMINISTRATION

Scandinavian Pulp and Paper Industries—

Their Past, Present, and Future

By ERIC G. LAGERLOEF, *Pulp and Paper Unit, Bureau of Foreign and Domestic Commerce*

IT WOULD SEEM that, in compensation for their remote northerly location, Norway, Sweden, and Finland, through their extensive forest areas, have been provided with very valuable economic resources. Some have called it "green gold," and, in truth, that is what these forest resources represent to these countries, for a considerable part of their populations depend upon this treasure for their subsistence. Because of this, the pre-war exploitation of these forests had been kept on the whole within the bounds of annual growth through extensive forestry practices.

In Norway, Sweden, and Finland, development of forest-products industries marked the first steps toward industrialization. From the small and comparatively crude industries of early days have grown some of the largest and most modern sawmills and pulp and paper mills to be found in the world today. On the whole, they manufacture the same products and operate in the same markets. It was, therefore, natural that there should have existed a certain competition between them, but, above all, they had common interests and a common goal. Cooperation between the Northern countries was thus perfectly natural, and became more essential as time went on.

Factors in Cooperation

In addition to many forms of economic cooperation in trade policy, shipping, customs, and communications between the three Governments, there were the cartels formed by the woodworking industries in the middle thirties. The Sulphite Pulp Suppliers (SPS) and the Mechanical Pulp Suppliers (MPS) were formed to regulate production and sales and to stabilize prices through fixing export quotas on wood pulp of all types. The Scankraft, Scangrease-proof, and Cap cartels were formed by the paper industries to accomplish similar results on the principal classes of paper products. The newsprint and sulphite-paper trades also had their own associations or conventions.

Nevertheless, this economic cooperation between these three countries had its limits because each country was an independent nation. They did not form a single economic unit. Therefore cooperation was limited to the extent that it applied only where interests and advantages were common. And yet, this cooperative spirit was spontaneous and continuous in the past, and may well be the key to post-war industrial revitalization in all three countries.

After Nazi Collapse?

When the European phase of the war has come to an end, there may well be a very heavy demand for wood pulp and paper, greatly exceeding supplies. The liberated countries will be anxious to import the goods necessary for rehabilitation and to build a foundation for future trade. Of these commodities, wood and wood products will play an important part. If Sweden retains its neutrality it will probably have to carry a very heavy supply burden in the international lumber, cellulose, and paper-trade markets for some time, until Norway, Finland, and Continental manufacturing services begin to offer any appreciable quantities in the world markets.

World markets after the war and the resumption of Sweden's exports to the United States and Great Britain are subjects of great interest at the present time. Sweden's capacity for supplying the needs in the quality field has placed it in an enviable position in the past, particularly in strong kraft pulp. Questions concerning manufacture, transportation (Sweden has lost 225 vessels or about one-third of its total pre-war merchant marine), foreign exchange, import duties, and competitive markets will arise. A group of specialists representing diverse Swedish industries visited the United States, the first part of 1944, and it is very likely that one of the most important topics of discussion was the one pertaining to the pulp and paper industry.

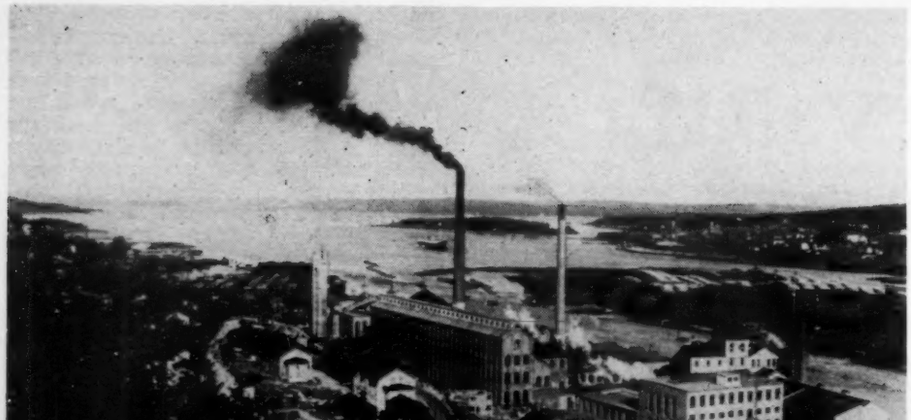
Comparison of Scandinavian pulp and paper exports—1937

Country	Total pulp		Total paper	
	1,000 short tons	Percent	1,000 short tons	Percent
Sweden	2,814	54	732	40
Finland	1,610	32	704	39
Norway	724	14	380	21
Total	5,148	100	1,816	100

Courtesy American-Swedish News Exchange

Pulpwood in the Indal River (Swedish Province of Medelpad), viewed from a bridge.

NOTE.—Many of the photographs accompanying this article were taken by the author during his 2½-year stay abroad working in many of Finland's largest pulp and paper mills.



Courtesy American-Swedish News Exchange

Svartvik mill of the Swedish Pulp Co.

Not Much Damage

Contrary to common belief, the forest resources of the Scandinavian countries taken as a whole have not been over-cut or generally destroyed during the war. The actual cut of timber in Sweden for lumber, pulp, and fuel wood has probably been less than half of pre-war drain. In Norway and Finland there has been more actual damage due to active war and greater demand for logs, lumber, and fuel wood to sustain the armies and for fortifications, but, even then, these factors have probably been offset by smaller cutting in other areas in these countries. The German quotas for wood production in Norway have not been fulfilled by a good margin, and the actual cut for the country as a whole has been within new growth. Of course, intensive forestry practices, such as planting of seedlings and selective cutting, have probably prevailed to a much lesser degree than formerly, but the smaller aggregate felling of timber would more than offset this factor. It would thus appear that unless there is further active warfare in the Scandinavian countries the forest resources will be in good condition for use in the post-war period.

SWEDEN

The wealth of the Swedish forests might have remained untapped for some time if the conditions for cutting, transporting, and working up of the timber had not been so exceptionally favorable. The most important factor is the natural network of waterways (20,400 miles of rivers suitable for floating logs), covering the entire forest region and making it accessible to exploitation even in the most distant parts. Sweden thus enjoyed many special benefits in this industry which gave the Kingdom a distinct advantage over its rivals.

Sweden is one of the most extensively forested countries in the world. Its forest area covers about 58,000,000 acres, or almost 60 percent of the entire country. These forests consist of about 85 percent pine and spruce, the former predominating, and from 10 to 15 percent hardwood. This rich abundance of raw materials of high quality has raised Sweden to a position of dominant importance as a pulp- and paper-producing country, thus making this combined industry one of the most important factors in the economic life of the nation. The exceptional importance of the forests may be judged by the fact that industries based on forest products employed more than 25 percent of the entire working population, while the value of forest-products exports accounted for nearly 50 percent of the country's total export value.

Wood-Pulp Expansion

One of the most outstanding features of the economic development of Sweden during the past few decades has been the unusual expansion of the wood-pulp industry. This industry had grown in less than 50 years from an insignificant beginning into the second largest Swedish export industry. In the peak year of 1937, exports of pulp amounted to about 2,814,000 short tons, or 42 percent of the total volume of the world's exports for chemical pulp and 31 percent for mechanical pulp. In that year, Sweden occupied first place as an exporter of mechanical pulp, bleached and unbleached sulphite, and sulphate pulp.

The first mechanical pulp mill in Sweden was built in 1857. At the beginning of the seventies about 10 such mills were in operation. In the nineties, interest centered more and more on the chemical method of production, and the result was a period of prosperity for the cellulose mills. The sulphite-pulp industry secured the greater share of this success, but the sulphate mills also advanced rapidly because they were able to utilize sawmill refuse and low-grade timber.

The extraordinarily rapid development of the wood-pulp industry, temporarily interrupted when the after-effects of the First World War reduced production to less than 800,000 tons, can be judged by the fact that production had increased to over 2,750,000 tons in 1929, and to almost 3,900,000 tons in the peak year of 1937. The large volume of pulp intended for rayon and staple fiber produced by the Swedish mills was evidence of the high-quality product turned out.

In 1937, the bleached-sulphite production was 514,000 tons, of which 175,000 tons was rayon pulp, mainly for export. Because of the great demand for unbleached sulphate (kraft pulp) from the United States and Europe, production in this commodity almost trebled between 1928 and 1937 (474,000 tons to 1,158,000 tons). The United States was the largest user of Sweden's cellulose, imports almost doubling between 1928 and 1937 (601,900 tons to 1,130,075 tons).

Two organizations were founded about the turn of the century for the purpose of promoting and safeguarding the interests of the wood-pulp industry: namely, the Swedish Cellulose Association and the Swedish Wood-Pulp Association, the former representing the chemical pulp industry and the latter the mechanical.

Paper Industry's Development

The manufacture of paper in Sweden has been carried on for almost 400 years, rags being used as the primary raw material. Although the first paper machine in Sweden was set up as early as 1832, and mechanical wood pulp came into use in 1857, it was not until the eighties that a general transition took place at the more enterprising mills to an up-to-date production of paper, aided by the technical improvements of the time. Before the employment of wood pulp as a raw material, the Swedish paper industry produced almost exclusively for the home market. The paper industry expanded with the rise of the wood-pulp industry, and its position as a staple industry may be said to have begun early in the present century.

Sweden's paper production can be divided into three classes, namely, manufacture of newsprint, wrapping papers, and fine papers, though there is a considerable manufacture of paperboard of all types. Newsprint and wrapping papers top Swedish paper production, representing about two-thirds of the total pre-war output. The prevalence of Swedish kraft pulp for wrapping paper and the abundant cheap water power for newsprint manufacture were decisive

factors of consideration in manufacture, and, furthermore, these two types of paper could be sold with relative ease in the world markets because of the usually low customs duties in the various importing countries.

Import tariffs on paper and paperboard were also the main reason for the fact that export production of container board did not reach any great volume in Sweden. Instead, a container-board industry grew up in Europe, during the thirties, based chiefly on kraft pulp imported from Sweden.

To look after the joint interests of the paper industry, the Swedish Paper Mills Association was founded in Stockholm in 1898. It did valuable work in coordinating selling regulations in the paper industry, and in unifying price quotations for certain qualities of paper.

In 1939, there were about 96 pulp mills and 74 paper mills in Sweden. Three-fourths of the production of pulp was turned out in mills located in Norrland and the Provinces of Dalarna and Varmland, while the manufacture of paper was concentrated in the southern part of the country—the principal reasons for this being the ice conditions in the Baltic and the fact that the major portion of the domestic market for paper was found in the more densely settled regions of southern Sweden.

Present War's Impacts

During the weeks close after the outbreak of war in 1939, there was practically a suspension in export shipments. Blockade measures instituted by the warring powers completely isolated the Swedish pulp and paper industries from their most important export markets. About 70 percent of the wood pulp and about 80 percent of the paper exports had been going to countries cut off by the blockade. Sweden produced in pre-war years between 3,500,000 and 3,900 000 short tons of wood pulp and about 1,000,000 short tons of paper and paperboard. The exports of wood pulp and paper and paperboard during the last 5 pre-war years (1934–38) annually averaged 2,407,000 tons and 644,000 tons, respectively.

Contrary to general opinion, the Swedish pulp and paper industry witnessed a decline in production and export in 1943, as compared with 1942, returning to the levels of 1941. For the 10-month period of 1943, sulphite wood-pulp operating capacity was only 43 percent of full production in comparison with 62 percent in 1942, while sulphate total operation for 10 months of 1943 was 35 percent of capacity in comparison with a like period in 1942 of 48 percent. The 1941 estimates placed the sulphite and sulphate wood-pulp production percentages at 35, while the groundwood industry had operated at not more than 10 percent of capacity during 1940, 1941, 1942, and possibly 1943.

Export Difficulties

Before the invasion of Norway in April 1940, Sweden shipped a large tonnage of wood pulp through that country because of mined waters off southern Sweden. Prices rose considerably in consequence of higher freight and insurance rates and higher production costs, which eventually necessitated many contract cancelations by the importing countries. As the war progressed and Norway was invaded, Sweden's wood-pulp exports sank from 1,088,500 tons in 1940 to 833,400 tons in 1941, and to 722,000 in 1942 (preliminary estimates). From January to March of 1943 wood-pulp exports were about 96,000 tons.

Paper and paperboard exports suffered a similar decline, from 663,300 tons in 1939 to 262,300 tons in 1942 (preliminary estimates).

From January to March 1943, about 50,000 tons of paper and board were exported. The export from June 1940 on was primarily restricted to shipments to or via Germany. Through the medium of trade agreements, Sweden was gradually enabled to make small shipments of wood pulp to Germany, Italy, and the rest of Europe. As this developed, a greater tonnage of rayon pulp was shipped to Germany and Italy. Under a global contract with Germany concluded in June 1940 Sweden could export 170,000 to 175,000 tons of bleached and unbleached sulphite and sulphate, and some rayon-grade pulp.

In June 1941 the German invasion of the Soviet Union brought exports to Europe to practically a standstill. Gradually, however, exports resumed, and during 1942, though hindered by payment and transportation difficulties, Sweden managed to keep its export channels with the Continent fairly clear.

Sharp Slackening

During 1943 exports to Europe slackened, since transactions on a compensation basis became more difficult. With no indication of an improvement and no likelihood of early exports to America or England, most of the mills, except for domestic production, will probably close down during the coming months. Some of the mills, whose mechanical set-up will permit, will probably run one machine or some portion of the plant. Several of the kraft mills are already shut down, and the industry is much concerned, particularly since the loss of its South American markets.

In the early part of 1943 a considerable business was done in the paper and cardboard market with Denmark, but this business has dwindled to a point where only a small amount of paper and cardboard will be utilized and that primarily for kraft-paper sacks.

To increase its exports in 1942 and 1943 negotiations were carried out with England and Germany for safe-conduct traffic for Swedish ships. Though there have been interruptions from time to time, safe-conduct traffic was resumed January 10, 1944.

Home Consumption Mounts

In paper, Sweden's home consumption has increased greatly, through expanded use in twine, rope, mats, sacking, packing containers, and as a substitute for tablecloths, napkins, towels, sheets, pillow cases, bandages, and similar items. Inland deliveries of paper and board increased from 264,000 tons in 1938 to 360,000 tons in 1942. Up to September 1943, the home market for paper and cardboard had been relatively firm; home-market sales in July and August 1943 were even slightly larger than in the corresponding period of 1942. The fine-paper and kraft mills are still the busiest, though war events have made it difficult for the kraft-paper mills to complete the old contracts and to make new contracts in the export market.

New Uses Sought

To compensate for the loss of markets, Sweden has turned to research to find new uses for its pulp and utilize the products of the forest in the Swedish home market. Fabrication of rayon and other paper textiles has increased, and production of cattle fodder from cellulose increased from about 60,000 tons in 1940 to about 300,000 tons in 1941.

Photo by Eric G. Lagerloef

Interior of a Scandinavian boxboard mill.

Finally such a great demand arose for cellulose fodder that the production resources of the sulphite mills became insufficient. It proved possible then to produce cellulose fodder also out of sulphate pulp. A Government contract covering the period from June 1942 to May 1943 called for about 600,000 tons of fodder cellulose, one-half of sulphite pulp and one-half of sulphate pulp. (This contract was later revised down to about 375,000 tons.)

For many months during 1942, for instance, the cellulose fodder traffic required almost 4,000 railway cars daily. Since the war began, more than a million tons of fodder cellulose have been manufactured by the Swedish pulp industry, most of it for home consumption. During the poor harvest years of 1940 and 1941, it saved many thousands of Sweden's cattle; however, the utilization of wood pulp in the manufacture of fodder cellulose is considered strictly a wartime emergency measure, undertaken in the absence of a sufficient amount of natural feedstuffs.

Byproducts have assumed increasing importance for Swedish pulp mills, and in some cases mills have been kept running primarily to supply these materials, such as sulphite alcohol (in Sweden there are today about 33 plants producing an estimated 30,400,000 U. S. gallons), liquid rosin, and cellulose yeast.

Indeed, its byproducts now are considered as important to the industry economically as the cellulose itself. Large production in items essential to the textile industry, including artificial silks and cellulose wools, has helped to relieve a serious cloth shortage.

Faced with the probability of being unable to regain all their old markets after cessation of hostilities, the Swedish producers of wood products are investigating new uses for the utilization of Swedish woods. This problem is engaging the attention of the Swedish Government as well as of private interests.

Bleaching Plants Built

Eighteen sulphite mills and six sulphate mills have built bleaching plants, and one is now in course of construction. The building of these bleaching plants results from two things: first, a desire on the part of the industry to meet increased world demands for bleached pulp, as well as high grades of paper to be made in Sweden from such pulp, and, secondly, a provision in Sweden's tax laws making it possible for capital investments to be made in plant facility on a basis very economical to capital. The capacity of the bleaching plants is not currently being utilized, but Sweden has built the plants with an eye to the future postwar period. About $12,500,000 has been invested by the pulp and paper industry in Sweden in the past 2 years in bleaching plants, office buildings, laboratories, and the modernizing of buildings and equipment.

Situation Now

From information available, it can be briefly concluded that less than one-half of the total capacity of the paper and pulp plants in Sweden has been utilized for production during the past 3 years; that plant equipment and machinery in this field have not been run excessively, and are in excellent condition; that ample shut-down time (at least 50 percent) and necessary quantities of supplies and repair materials have been available; that many new buildings, bleaching plants, and laboratories have been constructed in the past 2 years; that Sweden's forests are in a healthy condition through selective cutting, even though a large quantity of wood for fuel has been needed because of the failure of Germany to deliver coal; and that a study of the price of shares of the Swedish pulp and paper companies in the markets indicates that public confidence in them is good.

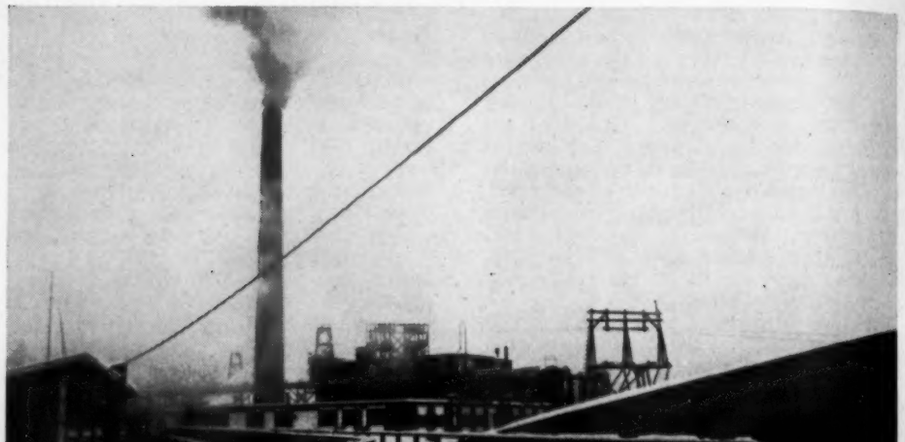


Photo by Eric G. Lagerloef

Sulphate-pulp mill at Joutseno, Finland.

Prices on the average have been well maintained; there has been very little variation in the price of pulp and paper during 1943, the price in December 1943 being approximately 300 Swedish crowns (U. S. $75) per ton. This price has been well maintained since 1939 when the price of pulp dropped to approximately 100 crowns (U. S. $25) per ton. Finally, in preparation for and anticipation of possible early shipments to former markets, at the end of 1943 there was on hand close to 500,000 tons of pulp, divided about evenly as to sulphite and sulphate wood pulp. This quantity is equivalent to only about 2 months' exports in 1937.

The war will have wrought many changes in Sweden's pre-war export markets, and the possibility of resuming exports to the United States on a former

Sweden's Productian and Exports

[Figures in short tons]

Woodpulp and groundwood				Paper and paperboard			
Item	1937	1938	1939	Item	1937	1938	1939
PRODUCTION				PRODUCTION			
Bleached and unbleached sulphite	1,803,540	1,562,278	1,731,195	Newsprint	312,178	284,868	309,746
Bleached and unbleached sulphate	1,271,604	1,057,361	1,055,700	Wrapping, all types	472,238	309,959	440,580
Mechanical groundwood	808,757	754,054	760,080	All other papers	145,049	130,852	168,053
				Paperboard	149,338	128,074	148,158
Total	3,883,901	3,373,693	3,556,975	Total	1,078,803	853,753	1,066,537
EXPORTS				EXPORTS			
Total to world's principal markets	2,813,615	2,183,115	2,569,786	*Total to world's principal Markets*	732,235	522,569	663,269
United States	1,084,634	830,087	957,879	Great Britain	252,785	184,494	268,688
Great Britain	650,242	636,392	726,723	United States	120,225	72,578	74,784
France	271,057	145,725	136,128	Argentina	39,302	29,308	38,757
Japan	123,068	17,877	13,200	Denmark	38,951	40,285	61,532
Germany	107,188	76,994	82,325	Belgium	30,415	17,573	18,653
Italy	106,785	107,762	168,614	Netherlands	26,965	21,315	31,241
Belgium	86,656	61,540	72,159	British South Africa	26,960	19,680	26,460
Netherlands	65,143	54,656	73,854	British India	26,844	18,234	20,923
Australia	43,660	28,544	12,011	China	25,304	4,465	5,942
Brazil	41,778	36,413	40,334	France	22,543	8,215	1,692
Argentina	30,279	26,851	36,379	Australia	15,607	10,919	10,998
Denmark	28,289	24,140	27,075	Egypt	9,946	7,286	8,067

Note: Wet pulp converted on basis that 2 tons wet equals 1 ton dry pulp.

Sources: World Wood-Pulp Statistics, 1927–1937, United States Pulp Producers Association. World Paper Consumption 1927–1938, U. S. Department of Commerce. Sveriges Officiella Statistik, Industri, 1937, 1938, 1939. Sweden: Foreign Commerce, 1938, 1939.

scale is very much in doubt, because of the increased new and efficient woodpulp capacity in this country and Canada. Canada has increased its chemical pulp production to meet both United States and domestic needs; in fact both the United States and Canada, because of proximity to the expanding South American markets, may be able to retain a larger share of their pulp imports than in pre-war years. The British and Continental paper makers will in all probability turn to Sweden for a large percentage of the Swedish pulp exports.

FINLAND

Owing to the relative scarcity of other natural resources, Finland, more than any other country, is dependent upon the forests for its livelihood. This is clearly apparent from the country's exports. Forestry has provided the foundation of the whole national economy of the country, and forest products have formed the most important part of Finland's exports, averaging 80 to 90 percent of the total pre-war exports.

For its size, Finland has the largest forest resources of any European country. Of a total land area of 84,912,000 acres, 73.4 percent is covered by forests, of which about 80 percent is productive. The natural conditions of the country were favorable to industrial forestry enterprises in that the most suitable types of wood for high-grade converted wood products predominated, namely, 60 percent pine, 28 percent spruce, and 12 percent birch and aspen woods.

Four Periods

Finland's pulp and paper industry went through four periods of development; 1870 to 1913; 1918 to 1927; 1927 to 1932; 1932 to 1937. In the first period, industries were developed steadily as the extension of railways opened new sections and water power was gradually utilized. At the end of 1913, production of chemical pulp amounted to about 250,200 short tons, paper and board production to about 249,700 short tons, while exports totaled 115,500 short tons and 161,900 short tons, respectively. Before the First World War the large Russian market was the principal outlet, but with the collapse of that market the plants had to be reorganized to meet the requirements of other European consumers.

When Finland became a republic in 1918, it faced a new future with resolve and determination to use its rich forest resources to obtain a place for itself in the world's wood-products trade. Three associations were formed in 1918 to safeguard the interests of the paper-making, cellulose-manufacturing, and mechanical-pulp, cardboard, and pasteboard industries, and to promote through joint action the sale of the members' products both in the country and abroad. These associations—the Finnish Paper Mill Association, the Finnish Cellulose Association, and the Finnish Woodpulp and Board Union—helped immeasurably to expand the home industries and to increase trade abroad through the establishment of representative agencies in large potential consumer countries.

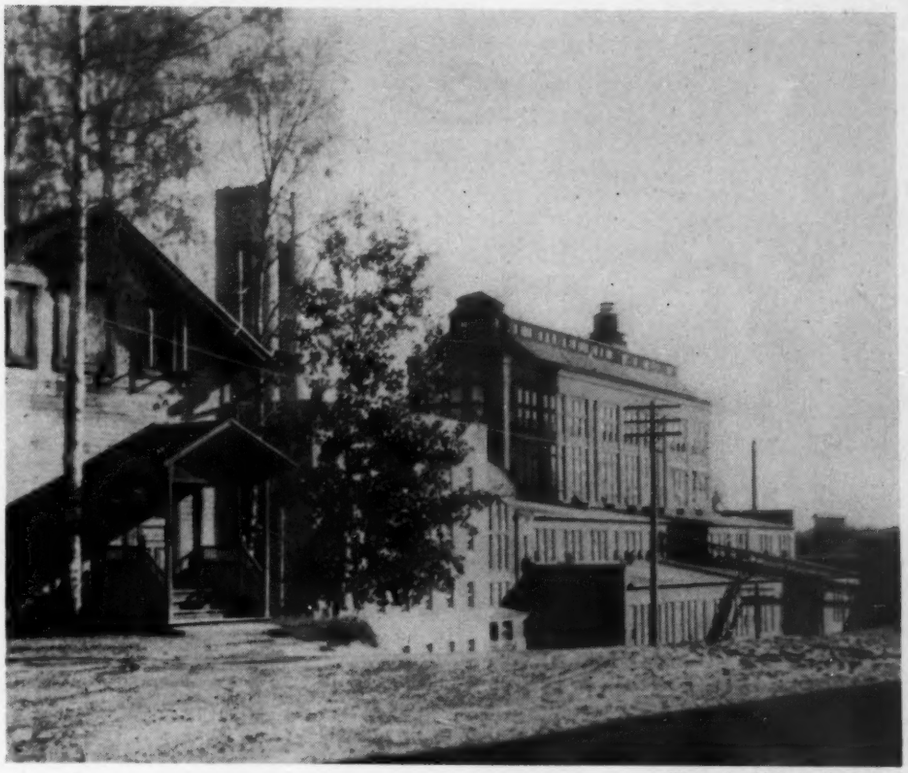


Photo by Eric G. Lagerloef

Enso-Gutzeit sulphite mill at Enso, Finland.

That this foresight succeeded is evidenced by the tremendous expansion in the pulp and paper industries since 1918. In the production of the world's cellulose and pulp, Finland's share was about 10 percent prior to this war, and the country occupied third place among the paper exporters of the world. From 1918 to 1927 production of pulp increased from 126,400 tons to 856,900 tons, while paper and board increased from 81,650 tons to 367,400 tons. Exports likewise reflected this great expansion, showing an increase from 84,000 tons to 513,400 tons of woodpulp and 26,500 tons to 290,600 tons in paper and board.

The third period of expansion (1927–32) showed an increase of more than 60 percent in pulp manufacture and more than 20 percent in paper and board. Exports in wood pulp had likewise increased to 100 percent over 1927, and paper and board exports showed a rise of 45 percent over 1927. Production of unbleached sulphite and unbleached kraft pulps registered a combined increase of over 70 percent—more than 60 percent of the total increase between 1927 and 1932. It was in this period that many more modern and larger pulp plants were erected.

It is in the fourth period of expansion, however, that the phenomenal increase in Finland's pulp and paper production can best be discerned. The year 1932 ushered in the latest era of development with new building activity and modernization of existing plants. In the time from 1932 to 1937, pulp production had increased almost 80 percent from 1,392,000 tons in 1932 to 2,515,000 tons in 1937, while paper and board production increased almost 85 percent, from 453,000 tons in 1932 to 844,000 tons in 1937. Exports increased commensurately, showing a 57-percent increase in pulp and an 81-percent increase in paper and board.

It is indeed remarkable that during this period, considering all the previous expansion since the last war, production should show its greatest increase in so short a span of years. The cellulose industry also expanded along new lines providing for the manufacture of various refined products such as rayon, artificial wool, cellophane, celluloid, cellulose lacquer, as well as manufacture of byproducts, such as sulphite alcohol, yeast, solid sulphate resin (pine oil), and soap.

War's Disruptions

With the outbreak of the European war in September of 1939, and the ensuing Russian War in November of that year, Finland started on a precipitous economic decline. Before its short but decisive struggle with Russia, Finland was the second largest exporter of chemical wood pulp in the world market, Sweden having attained first place. Finland's production facilities were to suffer greatly because of the Russian War, for the treaty with Russia in 1940 entailed the loss of approximately 25 percent of its cellulose production capacity, 4 percent of groundwood, 5 percent of newsprint, and 24 percent of paperboard capacity in the land ceded to the Soviet Union.

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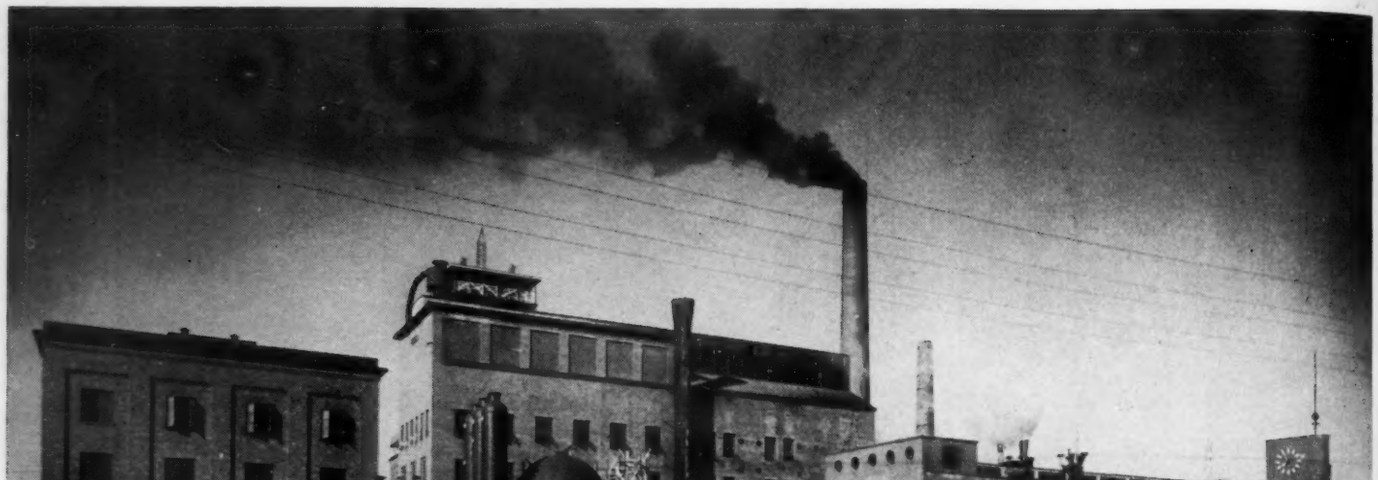


Photo from Eric G. Lagerloef

Kajaani Wood Co., Ltd., unbleached-sulphite mill in Finland.

The loss of the Karelian Isthmus was a severe economic blow to Finland, but the country rallied and carried on despite the maelstrom of war elsewhere in Europe. Exports suffered immeasurably in 1940 as there was instituted a planned curtailment of exports. Imports and exports were possible only by special license. Bilateral trade agreements were made, nearly all based on the clearing principle. Export prices of pulp were up 25 percent over 1939, paper slightly higher.

When German-Soviet hostilities began in June 1941, conditions for export were further complicated, in that Germany had virtual dictation over Finland's exports to the Continent, and consequently trade agreements and barter arrangements were set up to control the type and flow of materials between the two countries. General export trade with Germany increased to 51.1 percent of the total in the first quarter of 1941. Exports of pulp and paper increased appreciably in 1941, mainly through trade agreements with Germany, after suffering a 75 percent decline in 1940.

Factories which were removed from ceded areas to some extent in 1940 started work in 1941, and the unoccupied part of Finland showed an expansion of industry, partially compensating for the industries lost in the Karelian Isthmus. New products to be manufactured from wood were being investigated, and experimentation was carried out to locate new possibilities of production from the use of byproducts.

Picture Is Clouded

Conditions in the Finnish pulp and paper industry in 1942 and 1943 can be assumed to have shown some improvement, but little is definitely known of the actual picture. Paper and pulp production during the first quarter of 1943 was larger than in any quarter after the autumn of 1939. Cellulose production increased from 143,300 short tons to 176,400 short tons, and exports from 44,100 short tons to about 66,100 short tons in the first quarter of 1943. Mechanical groundwood production increased to about 13,200 short tons from practically a standstill, and nearly all of this production was exported. In this quarter, paper production also increased from about 55,100 short tons to about 99,200 short tons, while exports rose from 8,800 short tons to 49,600 short tons.

What the future of Finland's pulp and paper industry may be is difficult to de-

Finland's Production and Exports

[Figures in short tons]

Woodpulp and groundwood				Paper and paperboard			
Item	1937	1938	1939	Item	1937	1938	1939
PRODUCTION				PRODUCTION			
B leached and unbleached sulphite	1,242,569	1,001,662	738,903	Newsprint	462,640	441,617	484,794
B leached and unbleached sulphate	482,760	620,025	365,938	Wrapping, all types	141,356	n.a.	n.a.
Mechanical groundwood	789,337	804,258	674,904	All other papers	68,391	[1] 178,202	[1] 186,415
				Paperboard	172,316	161,791	129,355
Total	2,514,666	2,425,945	1,779,745	Total	844,703	n.a.	n.a.
EXPORTS				EXPORTS			
Total to world's principal markets	1,610,177	1,373,503	1,746,371	*Total to world's principal markets*	704,304	622,689	718,260
Great Britain	918,972	713,585	n.a.	Great Britain	227,522	185,560	n.a.
United States	288,926	271,566	n.a.	United States	173,482	164,673	n.a.
France	181,799	110,289	n.a.	Argentina	47,728	54,694	n.a.
Italy	56,163	56,612	n.a.	Denmark	37,983	37,282	n.a.
Germany	42,739	45,868	n.a.	Brazil	32,001	20,685	n.a.
Japan	41,445	14,278	n.a.	Belgium and Luxemburg	31,977	26,221	n.a.
Brazil	39,225	22,196	n.a.	Egypt	18,228	14,438	n.a.
Belgium and Luxemburg	30,778	23,709	n.a.	Netherlands	14,450	12,760	n.a.
Netherlands	30,632	21,922	n.a.	China	11,573	4,663	n.a.
Denmark	21,420	23,324	n.a.	France	11,072	5,435	n.a.
Greece	11,469	11,667	n.a.	Germany	10,524	13,165	n.a.
Australia	10,465	14,463	n.a.	British India	8,506	4,438	n.a.

[1] Figure includes wrapping paper; no classification available. Figures given under export are consumption data, not necessarily those of original sale.

n.a.: Not available. Figures given under export are consumption data, not necessarily those of original sale. Wet pulp converted on basis of 2 tons wet equals 1 ton dry pulp.

Sources: Statistik Arsbok for Finland, 1937, 1938, 1939, 1940. Finland Commerce 1937, 1938, 1940 (1939 figures not available). World Paper Consumption 1927–1938.

termine, because so many vital factors are, of necessity matters of sheer conjecture at the present time.

NORWAY

Norway is by no means a small country in size, compared with many other European countries. The area of Norway proper is about 80,000,000 acres, while its Arctic dependency (Spitzbergen or Svalbard) is about 16,000,000 acres. The total area is, therefore, about equal to that of the State of California.

The forest areas of Norway are rather modest in size when compared with those of certain other countries, such as the United States, Sweden, and Finland. The forests of Norway cover 25 percent of the total area alone, or approximately 18,000,000 acres, of which 52.7 percent consists of spruce, 28 percent of pine, and 19.3 percent of hardwood. The preponderance of spruce, which is especially suitable for high-quality pulp and paper, gave Norway an advantage over many other countries. This fact partly explains why sulphite pulp and mechanical groundwood played such a dominant part, while the sulphate-pulp industry represented a rather unimportant proportion of the total output.

With a population of close to 3,000,000, Norway could not consume more than a fractional part of the chemical and mechanical pulp and paper it produced. These goods have, therefore, for many years, been among the most important articles for export and comprised a large percentage of the total exports. In 1937, this proportion equaled 24.3 percent of the total exports, valued at 200,000,000 crowns (U. S. $50,000,000). The pulp and paper industries played a very important part in the commercial balance of the country.

Course of Evolution

The Norwegian wood-pulp industry got its start about 1870. The first mechanical pulp mill was established in 1868, to be followed soon after, in 1874, by a sulphate-pulp manufacturing mill. By 1891, the embryonic industry had grown and was producing 22,500 air-dry tons of sulphate pulp; it continued expanding until 1937, showing an over-all production of about 1,208,000 tons. At the turn of the century paper manufacture also began to progress, with a total production in 1903 of 60,000 tons, in 1913 of 210,000 tons, and in 1937 about 490,000 tons of paper, including board. Production and export figures for 1938 showed a large decrease over the preceding year, but in 1939 the figures indicated a better year generally.

Expansion in the pulp and paper industry increased yearly, until by 1939 there were about 130 paper or pulp companies in Norway, many of them owning several mills. A large number of these pulp-producing mills banded together to form the Norwegian Cellulose Association, which helped to centralize and direct the commercial and technical efforts of the industry.

It is quite natural that every country should have a special product of its own manufacture which had attained a wide recognition, and in the case of Norway, which enjoyed in the world a reputation for being very progressive in inventing and developing better methods of pulp and paper production, it was bleached sulphite rayon-grade pulp. In 1939, one-fourth of the world's supply of bleached sulphite rayon-grade pulp was furnished by the Borregard Co. alone, and altogether Norwegian firms that year furnished the world's rayon factories with one-third of their supply of rayon pulp.

Newsprint and Other Papers

Norway's paper mills produced a large variety of printing, writing, and other papers. In terms of quantity, newsprint constituted the most important part. In the years after 1929, the newsprint industry had experienced great difficulties on account of severe competition, combined with unremunerative prices. The output of the newsprint mills had therefore been, in general, below capacity, the bottom being reached in 1934, with a gradual ascending production in evidence since that year.

Norway's output of writing papers also showed continual growth from 1930 to 1938, with 1937 exports at 33,436 tons, indicating that the level of production had been well maintained. Wrapping paper, such as kraft, greaseproof, parchment, sulphite, machine glazed, and tissue were also increasingly exported over a period of years. Paperboard manufacture and export figures also reflected increased production and export volume.

The years 1932 and 1933 and in part 1934 were extremely difficult as regards foreign trade. Prices were down to a level unprofitable for all branches of the pulp and paper industry. Under these circumstances, the several major European producing countries attempted to improve conditions through an organized cooperation in regard to production and prices. Cartel agreements were the result of this mutual effort.

Nazis Shatter Pre-War Structure

Little is known of the pulp and paper industry of Norway since it was brought into the orbit of German economy in June 1940. That this vital industry probably has had to cut production drastically because of shortages of coal and other materials can readily be understood. Norwegian exports, under Germany's industrial set-up, have undoubtedly been to Germany and countries under German domination, as Norway's principal pre-war markets were either lost or are now controlled by the Germans.

Because of the occupation, now of almost 4 years' duration, and its inevitable effects upon the industry, it must be most difficult for the Norwegians to try to keep some semblance of order in this all-important segment of the country's economy. By manipulating finances, the Germans have infiltrated into major industries and plundered the Bank of Norway by more than $500,000,000. In anticipation of what the future may hold, it is unofficially reported that the Germans have mined every building and factory of consequence, ready to blow them up to make the country's destruction complete before being forced out. Besides, the Germans are in the process of stripping Norway of its chief industries, halting industrial expansion, and striving to take away with them all available industrial equipment.

If the Germans are forced to capitulate and surrender, without having to fight again in Norway, it may well be that enough will be left for salvage, to assemble a workable base for industry; if not, it is reasonable to assume that it would take some years after cessation of hostilities before Norway could resume its important place in the international pulp and paper trade.

(Continued on p. 27)

Photo by Eric G. Lagerloef

Loading sulphate wood pulp from lighter at Kemi, Finland.

Canadian Farm Sentiment: Today's Dominant Trends

By CLIFFORD C. TAYLOR, *Agricultural Attaché, and* IRVEN M. EITREIM, *Vice Consul, U. S. Embassy, Ottawa*

THE KINDS of resolutions and recommendations which are given birth each winter at the annual conventions of Canada's provincial and Federal organizations of farmers reveal the trend of agrarian grievances and demands. They often foreshadow the trend of subsequent Government action. For instance, some of the most persistent demands made by farm organizations a year ago may be linked with later developments:

(1) *A minimum price of $1 or $1.25 per bushel for wheat and the closing of the Grain Exchange.*

A fixed price of $1.25 was established and trading in wheat on the Grain Exchange was suspended in September.

(2) *More attention to be given to the essentiality of farm workers by Canada's National Selective Service.*

Governmental directives were subsequently issued which practically stopped the recruitment of farm workers for the armed forces and for industry, more liberal provisions were made for granting farm furloughs to men in the services and for detailing soldiers to farm work in emergency cases, and an elaborate plan was worked out for moving farm workers, at Government expense, from one part of the Dominion to another wherever their services were most needed.

(3) *Closer relations between the Dominion Department of Agriculture and Canadian farm organizations.*

An Agricultural Advisory Committee was set up by the Government in February 1943, including three members appointed by the Canadian Federation of Agriculture.

(4) *Creation of a Ministry of Food to eliminate confusion and duplication of authority between the Wartime Prices and Trade Board and the Department of Agriculture.*

On February 9, 1943, the Government issued a statement defining the lines of authority between the Wartime Prices and Trade Board and the Department of Agriculture in matters of food production, prices, subsidies, and rationing.

(5) *Establishment of a debt tribunal.*

A farm-debt act was passed, although it was not wholly satisfactory to several western organizations which were particularly interested in this matter.

(6) *Development of trade with the United States, particularly in feed grains.*

This recommendation has been implemented by the Canadian Government in various ways.

Shifting Emphasis

Notable in this season's crop of resolutions is the emphasis upon problems which may arise with the coming of the peace rather than on immediate wartime problems which have claimed the attention of farmers during the last several years. Post-war markets and prices, with considerable attention given to international as well as Canadian aspects, have been major subjects of discussion at most of the recent meetings. The disposition of Government-owned plants and equipment appears as a new interest. Few of the resolutions passed imply serious dissatisfaction with the Government's wartime measures, such as price ceilings, subsidies, and export and import regulations. Even the farm-labor policy escaped the condemnation that had been heaped upon it in the last 2 or 3 years.

Price Demands Moderate

The usual vehement demands of western organizations for higher wheat prices were not made this year, as the present fixed price appears to be generally satisfactory. Some of the western groups applauded the action of the Government in fixing the price of wheat and suspending trading on the Winnipeg Exchange, and urged that the present system be continued after the war. The Canadian Federation of Agriculture asked that the Wheat Board handle oats and barley on the same basis as wheat, the initial price to be no higher than the present ceilings but with participation certificates to be issued for further price payments. Numerous but relatively unimportant demands were made for adjustments in ceiling prices for various products.

The United Farmers of Alberta asked for a price of at least 20 cents a pound for bacon hogs at western delivery points and guaranteed prices of at least 12 cents a pound for good butcher steers at stockyards. The Ontario Cheese Producers' Association asked that the 1944 price for cheese be set at 25 cents a pound, f. o. b. the factory, plus bonuses and premiums.

Organized farmers show a growing tendency to look askance at production subsidies as something that can be taken away too easily and to prefer that subsidies be transposed more securely into the price structure itself.

Post-War Price System

Few specific suggestions for establishing floor prices have been made, but the farm groups have made it clear that they expect to be consulted in the formation of such plans. The National

W. I. B. photo

Canadian farmer: What is he thinking today? What measures does he favor?

W. I. B. photo

Sheep ranchers, keenly attentive, from the hill country around Kamloops, in British Columbia.

Poultry Conference asked for a floor price to producers of turkeys on the basis of 27 cents a pound for Grade A in Ontario. Delegates at the convention of the Canadian Federation of Agriculture emphasized that floor prices will be of very little use unless marketing of surplus farm products domestically and internationally is ordered and controlled under a properly planned system. Several organizations have asked that special boards be set up to deal with surplus farm products.

The Ontario Federation of Agriculture asked that minimum prices be set for all farm produce used for domestic consumption and that all surplus farm production be handled by producer disposal boards, presumably under a two-price system. These boards would be established to work in cooperation with the Federal and provincial governments. It also urged that Mutual Aid (Canadian Lend-Lease) be continued after the war to supply food for Canada's Allies.

The National Poultry Conference recommended that long-term contracts—4 years, if possible—be negotiated with Great Britain for surplus Canadian eggs at not less than present contract prices. This group also asked for the creation of a national board to control and dispose of surplus produce.

War Equipment for Farm Use

The Ontario Federation passed a resolution urging that war projects—plants, military camps, and housing schemes—be retained after the war as public utilities or transferred to farm cooperatives or other farm organizations. The New Brunswick Farmers' Association asked the Dominion Government to make available to farmers through their cooperative organizations all obsolete war equipment, goods, and other materials which can be put to use on Canadian farms and that farm organizations be permitted to purchase such goods and equipment from army ordnance at scrap or discard prices. The Canadian Federation of Agriculture asked that a representative of agriculture be placed on the war-assets corporation.

Export Curbs Not Popular

Western cattle producers continue to be anxious about their exclusion from the United States market. The resolutions of the cattlemen's organizations this year have asked for a lifting of the ban on exports of beef cattle as soon as that is practicable.

The New Brunswick Farmers' Association requested the Wartime Prices and Trade Board to remove restrictions on the export of seed potatoes.

Security for Cooperatives

Development of the cooperative movement is desired. Several organizations deplored the decision of the Dominion Government to levy income tax on cooperatives' patronage dividend funds just the same as on the profits of ordinary business enterprises. Farmers would like to have Federal Legislation which would place the whole cooperative system on an indisputable legal footing. The apple marketing boards, for example, are acutely aware that they are operating under authority only of the temporary War Measures Act.

Varied Recommendations

Several organizations requested the Canadian Government to make provision for more adequate supplies of farm implements, protein feeds, potato and vegetable containers, and other farm necessities.

(Continued on p. 38)

W. I. B. photo

Workers in an Alberta beet field sit down to lunch.

NEW BRIDGES Unite the Americas

By EDWIN W. JAMES, *Chief, Inter-American Regional Office, Public Roads Administration, U. S. Federal Works Agency*

NEW BRIDGES along the Pan American Highway route through 18 countries are playing the important but little publicized role of tying the Americas together in closer bonds and of accelerating development, production, and transport of critical war materials. Of special importance are the international bridges now linking 10 of the American republics. Latest of the international bridges to be completed is the 480-foot Goascoran River highway bridge connecting El Salvador and Honduras.

The war, which brought the compelling necessity for improved land communications "south of the border," particularly in Mexico and Central America, is responsible for increased bridge construction as well as road building on the artery of the Americas. The Corps of Engineers, United States Army, did a great deal of work on pushing a "pioneer" road through gaps on the highway in Central America before being withdrawn on October 31, 1943, because their services were more urgently needed elsewhere.

Fewer Unspanned Streams

The result of the war-expanded bridge-and-road construction program is that the number of unspanned streams and rivers on the Pan American Highway route, between Laredo, Tex., and Buenos Aires and Rio de Janeiro, has become fewer and fewer. Nevertheless, along the hemisphere highway, bridge construction still remains to be done in southern Mexico, Nicaragua, Costa Rica, and northern Panama, as well as in South America.

The bridge and highway construction on one of the gaps in southern Mexico—a 145-mile stretch between Comitan and Tapachula—presents such formidable obstacles to bridge and highway engineers that there is some doubt whether the Mexican Government will be able to finish the Mexican section of this international highway until after the war. Here the highway crosses the towering Sierra Madre range at an altitude of 6,500 feet. However, the work is going ahead, and an army of workers is now pushing construction up the precipitous sides of the inland range from Tapachula, near the Pacific Coast.

The resolution with which Mexico is tackling its part of completing the Pan American Highway system—the Middle America section is also known as the Inter-American Highway—was described recently by President Manuel Avila Camacho. He told the nation that the Administration proposes to continue work on the highway with utmost effort this year. Mexico, he said, considers that completion of its section of the highway is "an obligation to the countries of the Hemisphere."

Meanwhile, bridges are being constructed along the Inter-American Highway route in Costa Rica by the Public Roads Administration, of the United States Federal Works Agency, under the inter-American cooperative road-building program.

In South America, bridges still remain to be built in several parts of the Pan American Highway system to provide all-weather, all-year travel. This is, of course, particularly true of sections where the Pan American Highway route is still impassable.

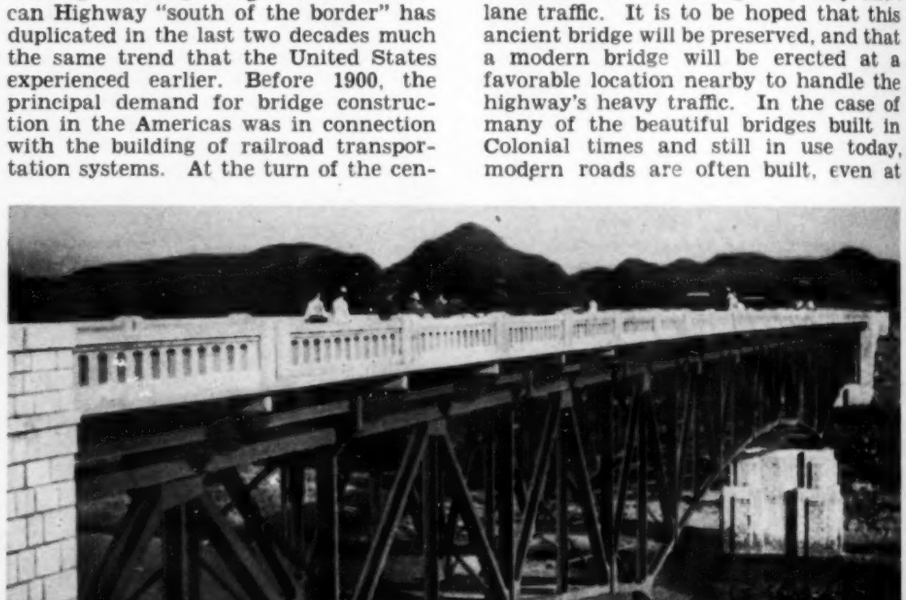
Duplicating U. S. Trends

Bridge building along the Pan American Highway "south of the border" has duplicated in the last two decades much the same trend that the United States experienced earlier. Before 1900, the principal demand for bridge construction in the Americas was in connection with the building of railroad transportation systems. At the turn of the century the need was for bridges of increased strength and clearance to provide for the increasing size, weight, and speed of trains. But the rapid development of automobile traffic in the United States, beginning about 1915, created a new phase of bridge building in the United States, which the other Americas did not generally witness until later.

As highway traffic increased in the United States, there was a demand for more and better roads, and later for express highways. This called for a greater number of large bridges, creating not only the demand but the economic justification for bridges of unprecedented dimensions over crossings that previously were left unspanned. The beginning of the Pan American Highway, in 1930, encouraged the building of both international bridges and others within national boundaries in the other Americas.

Well-Planned and Vital

The new bridges in Latin America are modern in design, well planned as to strategic location, vital to the economic life of the republics, and important in international communication, both in wartime and in peacetime. But there are other structures of historical interest still in use today which furnished the early links in a system, the magnitude of which at that time was not even imagined. One such bridge, for instance, is Puente Esclavos (Slaves' Bridge) in southern Guatemala, on the Pan American Highway route. This stone-arch bridge, built with slave labor about 1582 and rebuilt in the early seventeenth century, is still in use but is wide enough for only one-lane traffic. It is to be hoped that this ancient bridge will be preserved, and that a modern bridge will be erected at a favorable location nearby to handle the highway's heavy traffic. In the case of many of the beautiful bridges built in Colonial times and still in use today, modern roads are often built, even at



C. I. A. A. photo

Goascoran Bridge at frontier of Honduras and El Salvador, inaugurated December 16, 1943.

the cost of additional funds and planning, in such a fashion as to conserve the use and beauty of the bridges and preserve these famous architectural treasures.

Some Older Types

In the Pan-American countries one also finds old types of bridges similar to those in other lands. For instance, in the interior of several of the countries of Central and South America are bridges similar to the grass-rope bridge in India. The Western Hemisphere rope bridges are, however, often made of vines. They hang high across a chasm or arroyo.

In Mexico there is a bridge furnished with a gateway similar to most of the bridges built in Europe before the eighteenth century. In Europe the prototype of the Mexican bridge had a gateway built either on one of the piers of the bridge or on one of the approaches. These gateways not only had a military use, but were often flanked by a tollhouse. An interesting example of a similar arrangement is found about 10 miles from Mexico City, on the road leading from Teotihuacan. Here the long causeway is flanked by old guardhouses. Their use was presumably only military. Probably they were built there because the causeway was near the last of the overnight stops in that perilous journey which the Viceroys, sent from Spain to govern Mexico in Colonial times, had to make to the capital after landing at Vera Cruz.

Then again, beautiful examples of the so-called "old Roman bridge" may be found in Mexico. Many of these "bridges" were not properly bridges at all, but aqueducts. Mexican examples of these include: The ruins of one in Mexico City itself, one in Morelia, and another magnificently arched structure outside of Queretaro which still carries the water supply across the valley as it did more than 200 years ago. An aqueduct near Guatemala City is another example.

The International Bridges

Of the new highway bridges in the other Americas, the most noteworthy are the international bridges joining 10 of the American republics and the $700,000 Cuscatlan bridge spanning the Lempa River in the interior of El Salvador.

The international bridges cross the boundaries of the United States and Mexico; Mexico and Guatemala; El Salvador and Honduras; Colombia and Venezuela; Colombia and Ecuador; Brazil and Uruguay—and another such bridge, still under construction, will join Brazil and Argentina, across the Uruguay River.

According to Brazilian reports, a second Uruguayan-Brazilian international bridge will be constructed at Quarahy, Brazil, across the Artigas River, connecting with the town of Artigas, Uruguay. Another international bridge that has been proposed is a publicly owned structure to be built within a few blocks of the present International Bridge across the Rio Grande—between Laredo, Tex., and Nuevo Laredo, Mexico.

C. I. A. A. photo

Cuscatlan Bridge, over the River Lempa, on the Inter-American Highway in El Salvador.

Bridges—both highway and railroad—cross the United States-Mexico border at several points, but the much-traveled highway bridge connecting Laredo and Nuevo Laredo probably is the best known. Here begins the Inter-American Highway that leads to Mexico City and points south. In times of normal travel, thousands of persons drive over this bridge each month, journeying to and from Mexico.

This well-known bridge has a total length of 1,400 feet (427 meters). The two-lane highway is 24 feet (7.3 meters) wide, flanked by pedestrian walks which are each 8 feet (2.4 meters) wide. One of the features of the bridge is the removable railings which can be taken down in time of threatening floods.

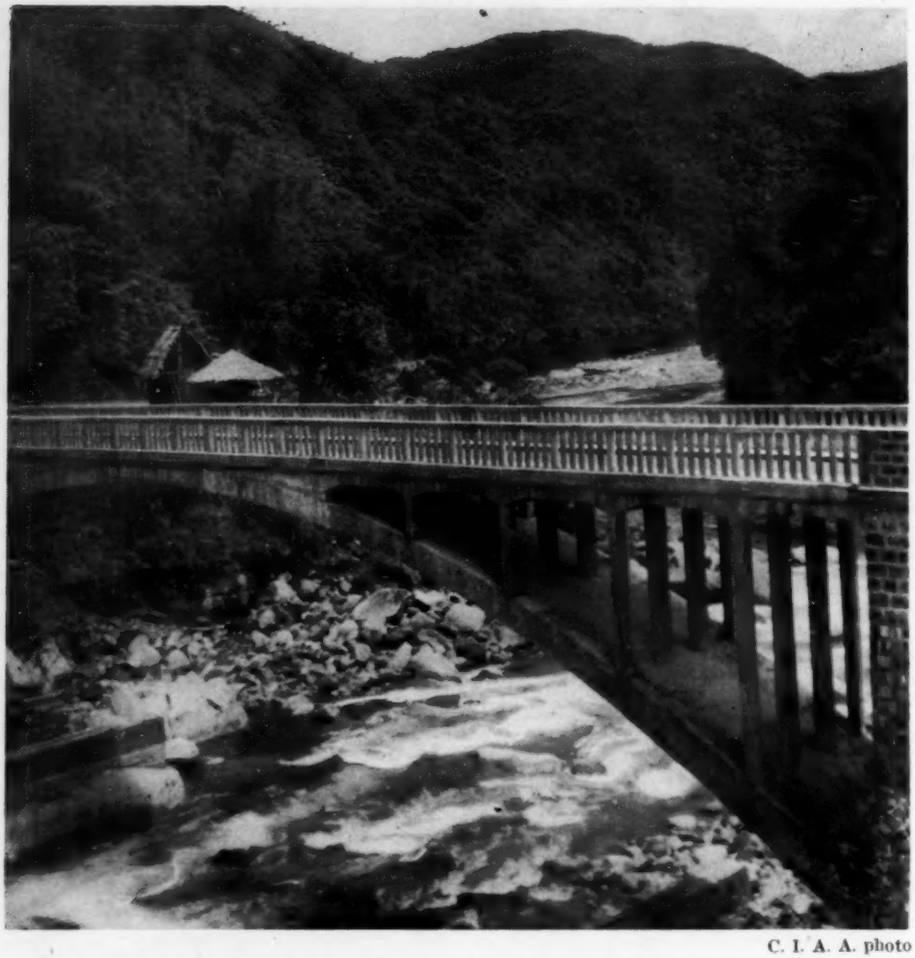
Mexico and Guatemala

Two international bridges connect Mexico with its neighbor to the south—Guatemala. One is a railroad bridge over the Suchiate River, providing rail connection between Suchiate, Mexico, and Ayutla, Guatemala. The other is a new highway bridge called El Talisman Bridge, located about 25 miles up the river from the railroad bridge. The railroad bridge provides, for the first time, direct overland traffic from the United States to Central America. On October 1, 1942, the first heavily laden freight train crossed the bridge, forging a new trade link in inter-American communications.

The bridge, of creosoted timber, trestle-type construction, is 1,140 feet long and was built in approximately 90 days under the direction of the Mexican engineer, Manuel Buenadad. Construction, greatly accelerated by the use of prefabricated parts from the United States, was at the rate of 37 feet a day. The cost, $80,000, was financed by the National Railways of Mexico. The speed with which this bridge was erected testifies to the urgency that existed at the time for a more satisfactory way of handling cargo and supplies, both road supplies and civilian goods, between the United States, Mexico, and Guatemala.

Suchiate is the southern terminus of the standard-gage railway system of the National Railways of Mexico. Ayutla, situated on the southern bank of the Suchiate River, is the northern terminal point of the narrow-gage system of the International Railways of Central America. The tracks on the new bridge are standard-gage. South-bound merchandise crosses the bridge in Mexican cars and is then transferred from one railroad to the other at the 300-foot covered transfer platform at Ayutla which has a narrow-gage track on one side and a standard-gage track on the other. Customs procedures take place at the transfer point.

Before construction of the railroad bridge some 300,000 sacks of coffee were,



C. I. A. A. photo

Newly completed bridge over the Topo River, in Ecuador—named for President Arroyo del Rios.

at one time, reported piled up at Ayutla awaiting shipment to the United States. Cargoes to Ayutla from Suchiate, on the Mexican side of the river, had to be moved by truck or oxcart to the river bank, ferried across the river on barges, and again transferred to oxcart and carried to the Guatemalan rail line at Ayutla. The distance between the two old terminal stations was nearly 3 miles (4.8 kilometers), and before the railroad bridge was built, only about 1,200 tons a month could be handled by these oxcarts. Now the bridge will accommodate 70,000 to 80,000 tons of cargo a month.

El Salvador and Honduras

El Salvador and Honduras are linked by a new international bridge. Formal dedication on December 15, 1943, of the 480-foot steel and concrete structure over the Goascoran River marked completion of a new segment of the Inter-American Highway as well as a connection between the towns of San Miquel in El Salvador and Nacaome in Honduras.

The bridge consists of a 220-foot (67-meter) counter span and two end spans of 130 feet (39.6 meters) each. The width of the structure is approximately 28 feet (8.5 meters), comprising a 24-foot (7.3-meter) roadway and 2-foot (0.6 meter) sidewalks on either side. It has a maximum elevation above normal water level of about 60 feet (18.3 meters). Built to carry six-wheeled trucks with a load of 27 tons (3 tons on front wheels, 12 tons on center wheels, and 12 tons on rear wheels), the bridge showed its ability in tests to carry loads of 50 tons without distress.

The bridge was built by a United States firm as a cooperative project of Honduras, El Salvador, and the United States Public Roads Administration. One-third of the construction cost of the bridge was paid by Honduras and El Salvador from loans received from the Export-Import Bank of Washington, and the remaining two-thirds of the cost was provided by the United States. Future maintenance of the structure will be the responsibility of Honduras and El Salvador.

The United States Public Roads Administration also is constructing two bridges within Honduras—one, a three-span bridge over the Rio Grande, of which two spans are already up; and the other, a three-span bridge over the Rio Guacirope, of which the substructures are finished. Their cost will be shared by the United States and Honduras, in accordance with the provisions of the Inter-American Highway Act. Under this act, the United States contributes two-thirds and the other contracting country one-third of the cost of cooperative construction on the Inter-American Highway.

In Northern South America

Colombia is joined with Venezuela by the Puente Internacional Simón Bolívar, connecting San Antonio del Tachira, Venezuela, and Cucuta, Colombia. It is on the Simón Bolívar Highway—a section of the Pan American Highway system—that connects Quito, Ecuador, and Bogota, Colombia, with Caracas, Venezuela. The approaches to this international bridge lead through two beautiful parks—the Parque Colombia, where a bronze statue of Simón Bolívar stands, in Venezuela, and the Parque Venezuela in Colombia. The bridge was jointly constructed by the Venezuelan and Colombian Governments.

Colombia is also joined by the Puente Nacional Rumichaca with Ecuador. The bridge crosses the border at a gorge a few miles south of the Colombian town of Ipiales, on the Pan American Highway route. At one end is the Colombian customs station with a draw chain across the highway; on the other side is an arched building over the road. Above the latter is a sign announcing it to be a customhouse of Ecuador.

East-Coast Countries

The Maua International Bridge, another link in the Pan American Highway, crosses the Yuguaron River and joins the town of Rio Branco, Uruguay, with the town of Juaguarao, Brazil.

Work has been proceeding since November 1941 on a great international bridge across the Uruguay River, between Paso de los Libres, Argentina, and Uruguayana, Brazil. The two nations will share equally in the building and financing of the $2,250,000 project. The total length of the bridge, excluding supplementary sections which will span adjacent areas subject to flood, is 4,659 feet (1,420 meters), divided into 10 spans, each 466 feet (142 meters) long. The roadway, which includes a 3.8-foot (1.15-meter) pedestrian walk, is 19.68 feet (6 meters) wide; the railroad right-of-way has a width of 12.46 feet (3.8 meters).

Cuscatlan: Outstanding Bridge

As for the Puente Cuscatlan in interior El Salvador, this longest suspension-type bridge in Central America was built by a United States steel-construction company for the Salvadoran Government which paid the entire cost—$700,000—without outside assistance. The bridge, dedicated in June 1942, spans the Lempa, the largest river flowing into the Pacific Ocean between the Colorado River in the United States and the Straits of Magellan at the tip of South America.

The dedicatory tablet hails the bridge in words that bear repeating:

Puente Cuscatlan—Dream of a Century, Realized by a Governor of Patriotic Faith and an Industrious and Virile People, Who Wished to Pay for This Work Themselves, Which Unites Even More Closely the Salvadoran Family With the Rest of America.

With Which It Aspires to Form a Solidary Continental Democracy.

U. S. Materials

Because of the scarcity of proper materials or fabrication equipment or skilled local labor in certain localities in Central America, a considerable portion of the bridge materials used by the U. S. Army Engineers in building the "pioneer road" came from the United States. In addition to the United States prefabricated parts used in the construction of the railroad bridge on the Mexican-Guatemala border, 93 prefabricated timber bridges and 8 abandoned steel bridges were bought in the United States and shipped to Central America by the Army Engineers. The prefabricated timber bridges ranged in length from 50 to 100 feet and were designed as one-way structures with a 15-foot clear roadway and H–15 loading. The steel bridges that were dismantled and reconditioned for shipment had spans of from 80 to 184 feet.

For the construction of permanent bridges along the Inter-American Highway, the United States Public Roads Administration entered into a contract with the Frederick Snare Corporation, of New York City. This contract now covers construction of 9 permanent steel or concrete bridges—4 to be located in Nicaragua, 2 in Costa Rica, 2 in Honduras, and 1 on the El Salvador-Honduras border. The construction of most of these bridges is well advanced toward completion.

Local Timber and Rock

The work of constructing bridges on the "pioneer road" in Central America—a route largely identical with the original Inter-American Highway route—was aided by a mission sent to Central America by the United States Forest Service. The forestry specialists went into the field and classified the timber that was available near the "pioneer road" route. Tests were made by the Forest Products Laboratory of the United States Forest Service, and basic working stresses were recommended for design purposes. Further field investigation enabled the engineers to determine that sound, straight trees were available which would furnish logs up to 80 feet in length. These logs could be hand-hewn by local laborers, who are very skillful at this type of work.

The program calling for the use of local materials as far as possible led to the utilization in Nicaragua of tufa rock of volcanic origin for arch culverts and for bridge substructures, abutments, and piers, where deposits were available. This has been used as building stone for centuries, and could be cut with hand tools to the approximate dimensions required for the work by workmen at the quarries. After delivery at the site, stone masons easily trimmed the stone to fit the lines of the structure. Upon weathering, the outside surface becomes harder. Inspection of bridge abutments and piers known to have been in existence more than 25 years showed practically no deterioration from weather or scour. The same stone in old buildings showed no sign of deterioration. The stone masons in Nicaragua turned out an excellent finished product with an appearance equal to that of any reinforced-concrete structure.

Health Program Helps

Important aid to the bridge-and-road construction on the Pan American Highway has resulted from the inter-American health and sanitation program. This program is combating malaria and other problems regarding health and sanitation along nearly 14,000 miles of the Pan American Highway. The program, recommended by the Rio de Janeiro Conference of American Foreign Ministers, is being carried out in Mexico, in all of Central America, and in every republic in South America, with the sole exception of Argentina. The United States agency cooperating with the special agencies set up in each contracting country to carry out the cooperative program is the Institute of Inter-American Affairs, of the Office of the Coordinator of Inter-American Affairs.

Thus United States health work, materials, engineering skill, and financial help have been merged with the materials, labor, technical skill, health work, and financial and other resources of the other Americas to bring about the realization of this greatest cooperative project in the history of the Western Hemisphere.

Great Benefits Seen

After the war, when automobiles, trucks, busses, tires, and gasoline again become available for widespread use, tremendous benefits for the good of all the Americas will undoubtedly result from this great highway's completion. In Central America one of the chief barriers to a better standard of living will have been removed. To almost as great an extent, the highway can perform the same service for South America.

The new highway *bridges* are vitally essential in making this "dream of a century"—as the Salvadorans put it—come true. It is to be hoped that these bridges will also be bridges to better understanding, a higher standard of living, and greater happiness for all the American peoples.

C. I. A. A. photo

One of many "little bridges": Stone arch culvert on the Inter-American Highway in Central America.

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Byproducts of Sweden's Shale-Oil Industry

Sweden continues to search for new uses of byproducts of the State shale-oil industry and to develop commercially those uses already known. Equipment has been installed to obtain sulfur from the sulfur gases generated in the plants.

Among the products obtained—in either test or commercial quantities—are titanium, vanadium, potash, ammonia, siliceous iron, and molybdenum.

The shale-oil industry is being assisted in research by a special committee of the Swedish Academy of Engineering Science.

News by COUNTRIES

Belgian Congo

Tariffs and Trade Controls

Gunpowders for the Native Trade Importation and Sale Regulated.—The importation into Belgian Congo and the sale of gunpowders for the native trade is permitted only when in sealed containers of a net weight not less than 225 grams or exceeding 500 grams, effective December 25, 1943, by ordinance No. 423/Fin.-Dou. of December 10, published in the Bulletin Administratif of December 10.

Belgium

Tariffs and Trade Controls

Leather, Leather Goods, and Footwear: Special Taxes to Cover Group Expenses.—To cover the administrative expenses of the Principal Group of the Leather Industry and of the Trade Groups of the Production Industries of Leather, Leather Goods, and Footwear, and of Furs and Rabbit Skins, in Belgium, a fixed tax of 250 francs per member enterprise and a variable tax of 0.10 percent of turn-over during 1942 were fixed for the budget year 1943-44, by ordinances of July 13, 1943, published in the Moniteur Belge (Brussels) of August 1, 1943.

Film Guild and Groups Established.—A Film Guild, with the rank of a principal group, was created in Belgium by an order of June 30, 1943, published in the Moniteur Belge (Brussels) of July 18.

The Film Guild is a public establishment and has exclusive representation of its economic activity. All enterprises and persons carrying on cinematographic activity on the date of this order are admitted as members of the Guild.

The Guild and its subdivisions are to assure the autonomous administration of cinematography in the trade, cultural, and economic domain.

A Film Production Group, a Film Distribution Group, and a Cinemas Group were established under the Film Guild, by an order of July 10, 1943, published in the Moniteur Belge of July 18.

Brazil

Exchange and Finance

Remittance Tax, Motion-Picture Business.—A decree law of March 11 reduces from 80 percent to 30 percent the percentage of remittances abroad by motion-picture companies subject to the income tax of 10 percent on profits sent out of Brazil. The percentage is also applicable to previous cases awaiting solution amounting to roughly 20,000 contos in escrow in the Bank of Brazil, which have accumulated since January 1941. The actual tax on the latter will be 8 percent on 30 percent of the total. Although the text of the decree law of March 11 has not yet reached the U. S. Department of Commerce, it is assumed that the lower rate of 8 percent applies to the accumulations, since the latter came into existence when 8 percent was the Brazilian income-tax rate on profits remitted abroad, whereas 10 percent is now the prevailing rate.

Canada

Wartime Commodity Controls

Regulations Prescribed for Disposal of Surplus Machine Tools.—The surplus of Government-owned machine tools which has developed out of the war production program in Canada will be disposed of to civilians under special conditions, according to an order-in-council dated March 4.

Under the terms of the order, surplus machine tools are to be transferred to the newly created War Assets Corporation Ltd. (See FOREIGN COMMERCE WEEKLY, February 12, 1944), which will have the responsibility of selling them to manufacturers and others who have expressed a desire to purchase machine tools either immediately or at a future date.

Although the tools will thus be made available to private companies, preference in making purchases will nevertheless be given to Government Departments and agencies. In addition, civilian buyers will be required to hold these machine tools available for use in connection with the war effort, and they will not be permitted to resell them without the consent of the Minister of Munitions and Supply. The Canadian Government also retains the right of repurchase at the prices at which the tools were sold by War Assets Corporation, less an allowance for depreciation from the date of such sale.

In establishing these selling prices, consideration will be given to the fact that many of the tools acquired by the Canadian Government were purchased at a cost substantially higher than the pre-war cost or the probable post-war cost of similar machine tools. However, except in special cases, the Corporation will sell these tools at not less than 75 percent of their original cost, less depreciation. Depreciation will be calculated on the basis of the following schedule, which takes into account the extent to which the machine tools have been used prior to the date of sale.

Group 1.—This group would cover machines, such as comparator's measuring machines, on which there is very little wear and tear.

Annual depreciation

5 percent.

Total depreciation to be allowed

Minimum of 5 percent; maximum of 15 percent.

Group 2.—This group would cover large, heavy machines, such as larger boring mills, planers, large punches and shears, and planer-type millers, on which depreciation is not rapid.

Annual depreciation

7½ percent for single shift;
15 percent for two or three shifts.

Total depreciation to be allowed

Minimum of 7½ percent; maximum 45 percent.

Group 3.—This group would cover a wide variety of machine tools most generally used and on which the depreciation is moderate, and would include engine lathes, radial drills, knee-type milling machines, and shapers.

Annual depreciation

10 percent for one shift;
20 percent for two or three shifts.

Total depreciation to be allowed

Minimum of 10 percent; maximum of 50 percent.

Group 4.—This group would cover the more generally used type of machines on which the wear and tear is more rapid than in group 3 because of the nature of the work they do. This includes automatic and production milling machines, automatic screw machines, automatic bar and chucking machines, turret lathes, grinders, and the like.

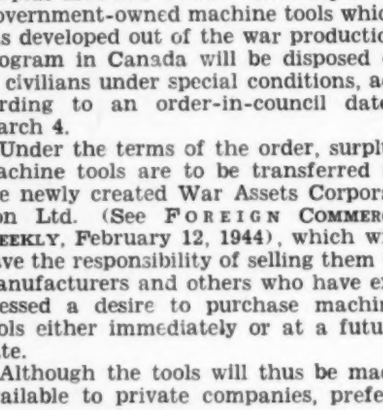
Annual depreciation

15 percent for one shift;
30 percent for two or three shifts.

Total depreciation to be allowed

Minimum of 15 percent; maximum of 75 percent.

The Cover Picture



Swedish Wood-Pulp Mill

Our cover picture this week serves to illustrate the feature article on "Scandinavian Pulp and Paper industries" on pages 5 to 11 of this issue. This view gives an excellent idea of the type of establishment operated by the Swedes in a business activity that means much to the stability and prosperity of the northern Kingdom's economy. The picture has been made available for our use through the courtesy of the uniformly helpful American-Swedish News Exchange.

Group 5.—This group would cover all special machines and all single-purpose machines, such as shell lathes, and the like.

Annual depreciation

20 percent for one shift;
40 percent for two or three shifts.

Total depreciation to be allowed

Minimum of 20 percent; maximum of 90 percent.

The Government's plan for the disposal of surplus machine tools is in general accord with the recommendations of the Canadian Machine Tools Builders' Association, recently submitted to the Machine Tools Controller, regarding the post-war disposal of Government-owned machine tools. The Association advocated that Canadian manufacturers be given the first opportunity to purchase such surplus equipment to replace privately owned equipment which will be in a run-down condition after continuous operation since the war began. The Association pointed out that by far the greatest percentage of the most up-to-date machine tools in the country are Government-owned tools, whereas much of the equipment in long-established Canadian plants is of old design, even predating the last war.

The Association believes that many Canadian plants would be interested in acquiring the Government's up-to-date tools if sufficiently attractive terms could be effected. They have recommended that payment be extended over a 5-year period, without interest, so as to make the tools pay for themselves. (No such provision is embodied per se in the order-in-council just issued.)

Export, Not Import, Suggested

It was the Association's suggestion that some of the late-type machine tools could be diverted to modernize the equipment in technical schools and colleges throughout Canada. After thorough modernization of Canadian industrial plants, and technical schools and colleges, they suggested that arrangements should be made by the liquidating authority (War Assets Corporation, Ltd.) for the disposal of the remaining surplus through agencies set up to rehabilitate devastated countries. The Association recommended also that for some time after the end of the war, importation of *used* machines of a class or kind made in Canada be prohibited. Canada already has a vast problem in the economical redistribution of the government-owned machinery at present within its borders. Allowing additional used equipment to come in would only make the situation more complicated.

It is of interest that these machine tools, which logically may have the greatest post-war value in modernizing Canadian industrial plants, are for the most part of United States origin. Citadel Merchandising Co., Ltd., the Government company established in June 1940, to stockpile and distribute machine tools for the war effort, has to date procured and placed in war plants some 45,000 machine tools, from the United States and Canada, valued at over $170,000,000.

Prior to the war, Canadian machine tools were practically all purchased from the United States, and during the early war years Canadian purchases from this country were stepped up rapidly from a pre-war figure of $3,913,000 in 1939 to $15,771,000 in 1940, and $53,510,000 in 1941. (For security reasons United States trade figures for 1942 may not be published.) At the same time the Canadian machine-tool industry expanded greatly, from $2,124,219 in 1939 and $18,366,000 in 1941, to an estimated production value of from $20,000,000 to $25,000,000 in 1942. This expansion, however, was mostly in the manufacture of single-purpose machines and it was found necessary to continue the importation from the United States of the large and more complicated universal tools.

Transport and Communication

Air Shipping Service From Canada to Venezuela.—A recent announcement has been made, says a February report from Venezuela, that a Canadian shipping firm is soon to institute a shipping service from Canada to Venezuela.

China

Economic Conditions

Commodity prices in the chief centers of Free China during January 1944 increased almost 15 percent over prices for the preceding month, and trade associations in Chungking have petitioned the Government for authority to increase prices of certain commodities because of increased cost of production. Prices having increased to almost 200 times those of 1937, with the exchange value of the U. S. dollar only 13 times as great, the outlook of American missionary and other domiciled organizations appeared gloomy.

Agriculture

Several provincial governments have announced plans for increased agricultural production, with Szechuan Province having the most ambitious schedule. In that province the authorities have embarked upon a program of planting more

Pertinent Comments on World Economy Today

[Being one of a series of excerpts from books, pamphlets, and speeches]

Bright Prospects for Central American Development

At this time, spurred on by wartime conditions, Central American industries have expanded, in number and in capacity. The commerce of the six Republics, which had advanced steadily since the middle thirties, especially in respect to the proportionate share of the United States, suffered a slight recession on the import side during 1942, a scarcity of many types of goods formerly purchased from the United States resulting because of the unavoidable restrictions imposed by war. However, the trade picture brightened considerably for the nations of Central America in 1943, due to the great gains made in combating the submarine menace and the shipping shortages.

Transportation, the indispensable adjunct of both industry and commerce, has registered epochal progress in Central America during recent years. These new and improved facilities for the movement of goods and people constitute the lifeblood of national economy in each of the six Republics.

The industry of Central America has been in an elementary stage. Few heavy industries existed, those industries in operation consisting of handicrafts and other simple manufactures, along with processing and fabrication which depended entirely upon domestic agricultural and pastoral production for their raw materials. Now, stimulated to some extent by the war but due largely to the growth and expansion of Central American economies, these industries are being enlarged and many new ones are being established. This partial industrialization movement in Middle America is already contributing to the welfare of the people. Many goods formerly imported are, and will continue to be, manufactured within each Republic. In addition, this new production will increase inter-American trade and raise the living standards of the citizens of these nations.

New and increased transportation facilities—by land, air, and sea—are rapidly becoming available throughout Central America. Many new roads have been built and others are under construction. The considerable progress of the great Pan American Highway in Middle America, with most sections therein completed and a pioneer through-highway scheduled for completion in 1944, is perhaps the most striking development in this field. New and improved air service by commercial airlines, particularly after the war, is expected to prove invaluable to Central America. The progress of the railroads and of shipping services, especially when the needs and perils of war are a thing of the past, is expected to be rapid and important.

Thus, with increased production of raw materials at home, coupled with increased demand for this production abroad; with great new arteries of transportation available, making the shipment of goods more extensive and more profitable, at the same time providing the means through which more imported goods may be had, especially in the interior; and with industrial activity on the rise, it is logical to believe that the current expansion of Central American commerce will not only continue, but will reach new heights, in future years.

(From "Progress of Industry, Transportation, and Commerce in Central America," by John F. Hennessey, jr. Publisher: Pan American Union, Washington.)

than 1,500,000 acres of early maturing rice, which would permit the harvesting of two crops a year. The Sinkiang Government was reported to have allocated 37,500,000 yuan, or local currency, for farm loans, of which over 7,000,000 was for cotton planting, 20,000,000 for spring planting of food crops; and the remainder for reclamation work.

In Kwangsi increases called for the planting of 45,000 acres of lowland rice, with an anticipated yield of more than 260,300 bushels; almost 17,000 acres of corn, with an estimated output of more than 198,000 bushels; 10,000 acres of sugarcane; and approximately 3,500 acres of sweetpotatoes. In addition, and to ensure success of this endeavor, quotas were established for an output of about 80,000 metric tons of manufactured fertilizer, 500 tons of bone dust, and more than 27,000 tons of manure.

In Honan and Shensi Provinces anxiety over the possibility of inadequate moisture for the winter crops was relieved somewhat by heavy snowfalls early in February. Reports from Kiangsi Province indicate the formation of a new corporation to develop agriculture, fishing, stock raising, and forestry in that Province. Other plans call for the manufacture of small threshing machines, sugarcane presses, and other agricultural equipment for the use of farmers on a loan basis.

The Food Ministry is planning the construction of new granaries and the repairing of those now in existence, with a combined capacity, when completed, of almost 150,000 metric tons. It is believed these depots will provide storage facilities for the rice and wheat expected to be collected from the land tax, in kind, and from compulsory sales. Motortrucks are to be purchased to provide transportation of these grains.

Industry

Industrial conditions in south-central China apparently were on the decline, with 23 of the 90 companies operating in the Hengyang area of Hunan Province unable to continue production after the Chinese New Year (January 25). In Kwangsi Province, particularly at Kweilin, the authorities were making loans available to industries to stimulate production. The controlled prices of manufactured articles, coupled with the increased cost of production, has made it almost impossible for the industrial organizations to make a profit, let alone avoid a loss.

A coal shortage in Kweilin has reduced still further the supply of electricity available to the factories, necessitating curtailment or even suspension of operations. There was also a shortage of water, because of inadequate electrical power to operate the pumps. To supplement the electrical supply of Liuchow in Kwangsi Province, a 3,000-kw. power plant started operations in the middle of January.

Other industrial enterprises recently completed, or now under construction, include a paper mill at Shaoyang, Hunan Province, with an estimated output of 60 tons per month; an iron foundry in Kiangsi utilizing iron-ore resources found in that Province; a small aluminum reduction plant in Kunming, Yunnan Province, with an anticipated production of 30 tons monthly; and a steel company in Chungking to manufacture a rolling mill, which when completed will be capable of producing 35-pound rails.

Foreign Trade

Trade between the free and occupied areas of China continued active during January, as did commerce between the U. S. S. R. and Unoccupied China. Cotton, in the amount of 600,000 pounds, was received in Chungking through the Yangtze River port of Santowping in Hupeh Province. December imports into the U. S. S. R. from Free China included approximately 83,000 pounds of bristles, 15,000 pounds of wool, and more than 20,000 sheepskins.

Transport and Communication

Extensive Improvements in Transportation Systems.—The Ministry of Communications has announced that railroad construction during 1943 in Free China totaled 350 kilometers, and highways constructed or repaired amounted to 3,200 kilometers. Railway development during the past year included the rehabilitation of the 85-kilometer line between Shangjao in Kiangsi to Chiangshan in Chekiang Province, and acquisition of 288 kilometers of line from the Yunnan-Indochina Railroad.

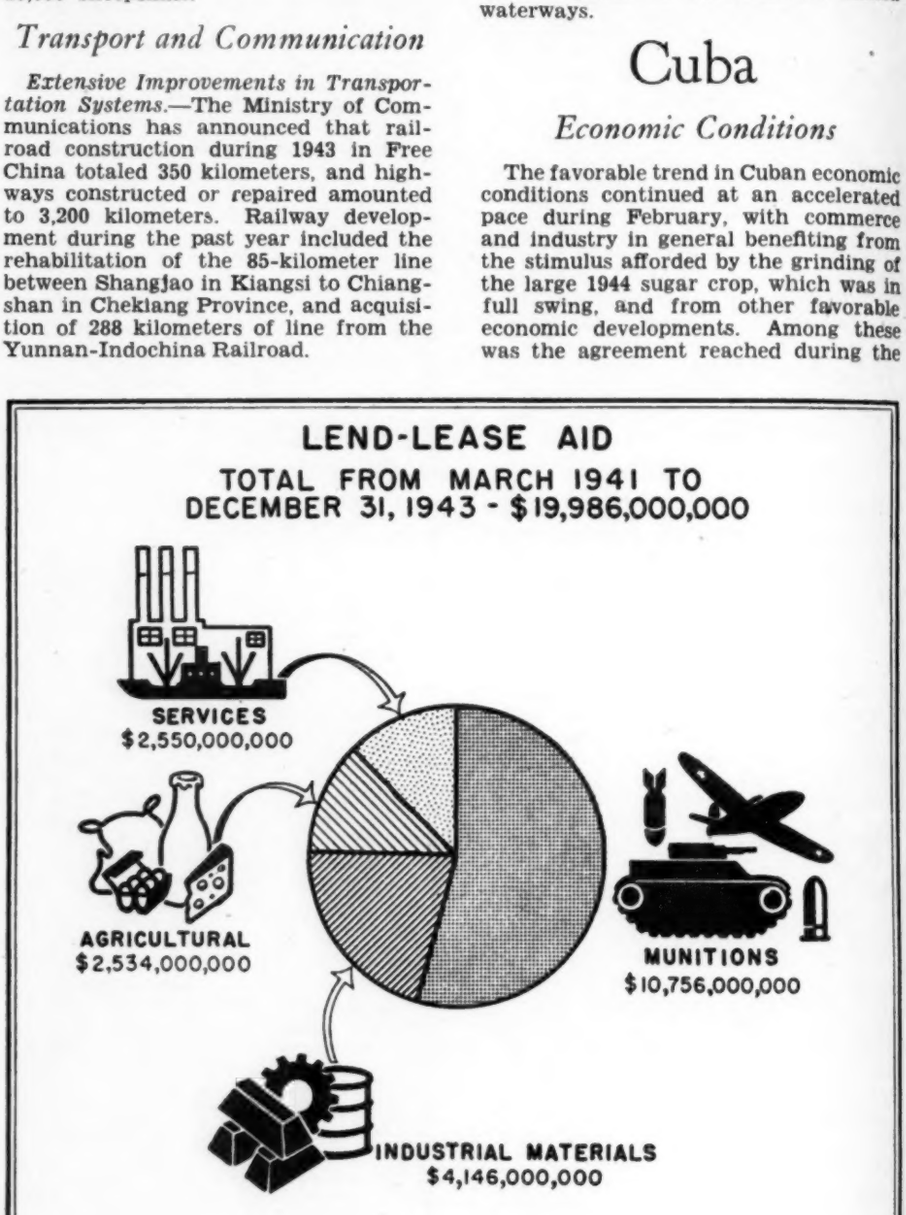
The program for the current year calls for the extension of the Lunghai Line westward to Tienshui in Kansu Province, and the Kwangsi-Kweichow railway to Kweiyang, Kweichow Province; also rehabilitation of rolling stock on all lines. Traffic on the latter of these two lines was to have been inaugurated on March 1, 1944, between Liuchow, Kwangsi Province, and Tuyun in Kweichow, a distance of approximately 440 kilometers.

Other highlights planned for 1944 are the establishment of a Kweilin-Kunming-Chengtu commercial airline by the Central Air Transport Corporation, improvements on the Yellow River between Ningsia and Lanchow to permit boat traffic, and the allocation of orders for engines to machine shops in the Chungking area for use in forming a motorized fleet of junks on Free China's inland waterways.

Cuba

Economic Conditions

The favorable trend in Cuban economic conditions continued at an accelerated pace during February, with commerce and industry in general benefiting from the stimulus afforded by the grinding of the large 1944 sugar crop, which was in full swing, and from other favorable economic developments. Among these was the agreement reached during the



FOREIGN ECONOMIC ADMINISTRATION

month for the purchase by the United States Government of 85,000,000 gallons of Cuban blackstrap molasses, and up to 20,500,000 gallons of industrial alcohol at remunerative prices; the continued improvement in Cuba's foreign trade; the further recovery from the lows of the last 2 years of fruit and winter-vegetable shipments to northern markets; the continued heavy exports of tobacco and tobacco products; and a further extension of Cuba's public- and private-building boom.

Commercial and industrial activity as a whole advanced to higher levels in line with the seasonal pattern. February normally is one of the peak months of the year as regards the trade and financial movement. Commercial and financial indexes are already beginning to show that this year will be no exception in this regard—higher levels as compared with recent years probably will be attained in view of the unusually large sugar crop and longer crop season, the active demand for merchandise, the continued relatively satisfactory shipping situation, the somewhat better supply situation as regards materials and manufactures furnished by the United States, as well as other factors.

Construction activity proceeded apace, aided by the availability of capital and building supplies, and the initiation of additional Government projects. Electrical-energy output and telephone installations increased during the month.

Food Situation

Meat and livestock products were scarce, as a result of seasonally low marketings and exceptionally rapid disappearance, although no real hardship resulted therefrom. Beef, dried salt pork, and condensed milk were the most seriously affected. Fruits and vegetables, dried beans, cereals, and fats and oils were adequate to meet current demands. Total monthly consumption of foodstuffs by the Cuban people is greater than the pre-war rate.

Rice imports were approximately equal to consumption in February. Lard imports exceeded domestic needs, and the wheat supply situation was good.

Price Control

It is estimated that the basic foodstuff price index in February was unchanged from January. Since September there has been a slight downward trend. During February there was some selling of rice and charcoal above ceiling prices. Milk and livestock producers and bread bakers pressed for increased ceiling prices in their products.

Labor

Labor organizations continued to agitate during the month for wage increases, and the Government issued, among other labor measures, decree No. 369, granting 10, 15, and 20 percent wage increases to textile workers. Decree No. 370 established similar wage increases for operatives in garment-making and mattress industries, and decree No. 371 ordered the payment of a 10 percent bonus on the salaries and wages of all employees of sugar mills during the present crop. A collective labor agreement was signed by the syndicate of bank employees of some of the banks which provided for wage increases of about 28 percent.

Agriculture

Cuban agriculture during the month of February was generally active and prosperous, mainly because of the fact that all except one of the 158 sugar mills were operating to grind the large crop. An increased domestic demand for foodstuffs assured a ready market for most agricultural products. The weather in February was unusually dry, even for the dry season. This favored the ripening of the sugarcane and harvesting operations, but resulted in poor pastures, which further reduced the supply of milk.

Tobacco

The tobacco harvesting season is well advanced, and it is now evident that the 1944 tobacco crop will be better than average in quantity and quality because of increased plantings and good weather. Current information indicates a 1944 crop of more than 60,000,000 pounds, which would be about 50 percent more than last year's small crop and 20 percent more than those of other recent years. This large crop will be readily absorbed because of the war-born stimulation of domestic consumption and exports. During the month under review, exports of leaf tobacco and cigars continued large. Over 2,250,000 pounds of unmanufactured tobacco and more than 20,000,000 cigars were shipped to the United States alone.

Fruits and Vegetables

Shipments of fruit during February consisted largely of pineapples from Habana, in addition to bananas shipped from the eastern end of the Island. Pineapple shipments were more than double those of the corresponding month of last year. Prices obtained in New York thus far this year have been very profitable. Other fruit shipments, except the normal movement of bananas, were seasonably small and unimportant.

Tomatoes accounted for 93 percent of total shipments of fresh vegetables during February. This was the largest monthly movement of tomatoes since January 1942. Shipments this season, however, are still far below pre-war levels, as a result of the lack of refrigerated shipping facilities direct to New York. Even with the higher cost and spoilage occasioned by the longer transit time, the prices obtained in New York were attractive.

Industry

Various branches of Cuban industry were affected by raw-material shortages. Paper production was curtailed because of the limited stocks of pulp, and, unless shipments are received in the near future, some plants will have to cease operations. In the textile industry, rayon producers continued to operate, as for some time past, on a minimum basis, in view of the short supply of yarns. Cuban piece goods production has declined as a result of the transfer of a portion of

Demographers Chart Future Trends of Europe's Populations

The population of Northwestern and Central Europe will decline within the next generation. The decline will be speeded up by the war, but would occur in any case. Indeed, most of the countries of this region will attain their maximum populations by 1955 if the trends of the interwar period continue. The population of Southern and Eastern Europe will increase somewhat longer. That of the Soviet Union will experience an enormous growth within pre-war boundaries, and in spite of large war losses will have gained perhaps as many as 50,000,000 people between 1940 and 1970.

These conclusions are derived from a series of population projections that form the basis of a study about to be published by the Economic, Financial, and Transit Department of the League of Nations at Princeton, N. J. The study has been conducted for the League by the Office of Population Research of Princeton University, and will be available in book form under the title "The Future Population of Europe and the Soviet Union," from the Columbia University press.

The authors call attention to the difference between the situation at the time of the First World War, when war losses were quickly closed over by the high rate of natural increase of rapidly growing populations, and the current one when the war strikes European populations which are growing at a much slower rate. The losses will be made up *with great difficulty if at all* in Northwestern Europe. Only in Southeastern Europe and in Soviet Russia may they be expected to be quickly recovered by natural increase.

Fundamentally these different rates of growth are related to the age structure of the populations. The Northwestern and Central European countries have populations centering in higher age groups than those of the southeast and Russia. The most numerous age group in Germany in 1940 was that of 30 to 35 years, while the Soviet Union had more children under 5 than in any other 5-year age span, and these will form the basis for rapid growth during the next few decades.

Migration from the more rapidly growing to the less rapidly growing areas might affect the situation but would have to be on an unprecedented scale in order to change the picture materially—and the authors do *not* expect a balance to be achieved in this way.

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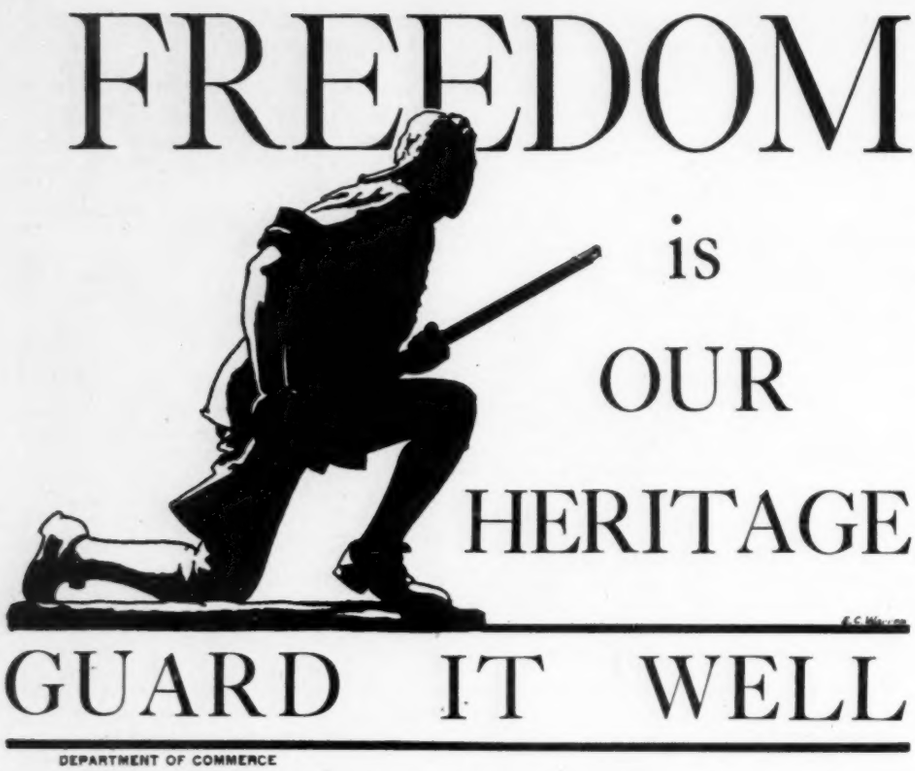


the production capacity into the manufacture of bags. This does not affect the output for domestic consumption, however, which is being maintained at recent levels. Stocks of piece goods are nevertheless very low. The chemical trade as a whole experienced one of the best months in many years, as the demand is exceedingly active and shipments have been received in large volume. The tire factory ceased operations during the middle of the month, in the process of transferring its plant to the use of synthetic raw material instead of crude rubber. Operations were expected to be resumed during the latter part of March.

Foreign Trade

Cuban imports during February were higher than in January and substantially in excess of imports during the corresponding month of last year. The export volume during February showed a sizable increase over the tonnage shipped out during the month of January, but was about the same in amount as in the corresponding month last year.

Dominican Republic

Economic Conditions

Economic developments in the Dominican Republic during February reflected national absorption in the celebration of the first Centennial of the Republic's independence. While interest in current developments with regard to prices, shipping, and crops continued, general attention to those matters was subordinated to the effort of fittingly celebrating the Centennial.

Retailers' stocks during the month were maintained at satisfactory levels, except in regard to those manufactured articles in short supply because of American wartime manufacturing restrictions. The Centennial celebration, with its attendant influx of visitors to the capital, inspired brisk movement of merchant stocks, but adequate shipping has kept them replenished.

Construction activity, including repairs, beautification, and various public works, continued until the time of the Centennial celebration, then dropped sharply with the completion of numerous special projects. The ensuing decline in construction activity at the end of February considerably augmented the labor supply by freeing large numbers of men who had been engaged in construction work.

Shipping and Labor

The problems of shipping and labor caused grave concern to the Dominican sugar industry during February. As the result of a survey conducted by the Dominican Sugar Producers' Association, relief in the form of adequate shipping to move the large stocks on hand was requested. A promise to supply the necessary bottoms to move the sugar resulted in several vessels arriving for the purpose. But to alleviate the situation, many times the tonnage made available so far must be forthcoming. The sugar industry's labor problem, as yet, gives no promise of solution. There are no possibilities of obtaining the assistance of Haitian labor, and, because of the lateness in the season, it was believed that no employees could be obtained from the British West Indies. To add to the problem, the forthcoming rainy season, while reducing the output of cane cutters, will also result in further depletions of existing labor, since many workers will then wish to attend to their own subsistence plots. The approaching Easter holiday will also divert existing labor from the sugar fields, all at a time when the sugar crop is at its point of maximum yield.

Agricultural Commodities

The current coffee crop is a small one, having suffered from heavy rains last summer. However, no particular concern is shown by exporters who maintain that even with a reduced crop, prevailing prices are high enough to insure a prosperous coffee season.

The size of the current winter crop of cocoa has been reduced by the severe drought in the northern part of the Republic. The quality of the remainder of the crop, however, is good. Exporters were encouraged regarding shipping facilities, and all stocks on hand are expected to be moved by April 15.

A poor year is seen for Dominican tobacco in 1944, owing to the lack of rain. Hand irrigation was attempted but was not very successful. There are no stocks from previous crops. Buyers, however, are still showing interest in whatever may be available.

Possibly one of the most significant agricultural developments in the Dominican Republic in the last few years has been the rapid strides made in the production of rice. Always, before, an importer of this commodity, the Dominican Republic in 1940 began to export rice. However, it appears that during 1944 rice may drop out of the picture completely as an export product. The two factors of chief importance in this decline have been the dry-land rice-crop failure and a sharp increase in domestic consumption. Prospects of sizable exports of rice in 1944 were further damaged by the recent increase in existing taxes on the production, importation, and sale of rice.

Foreign Trade

Available shipping in January and February was below actual needs, considering the volume of goods to be moved, but foreign trade, nevertheless, continued to be better than that for the comparable period of 1943. The volume of January exports was nearly double that of the corresponding month a year ago. February exports suffered a slight decline from January in volume, and a more appreciable drop in value, since sugar shipments during the month were light. Exports to the United States were down sharply from January, but exports to Puerto Rico more than doubled. Imports were received at a very satisfactory rate during the period under review, shipping from the United States being somewhat heavier than usual.

Ecuador

Tariffs and Trade Controls

Dehydrated Eggs Allowed Duty-Free Entry.—Ecuador will allow the importation of dehydrated eggs duty-free, according to executive decree No. 2020.

dated December 22, 1943, published in the Registro Official No. 1025 of January 28, 1944.

Transport and Communication

Airport-Extension Project Completed.—Since the completion of the Guayaquil airport-extension project, Ecuador has one of the largest and finest landing fields in South America, states a January report.

Eire

Transport and Communication

Increased Receipts and Expenditures.—The gross receipts of the Great Northern Railway Co. of Eire for the year 1943 amounted to £2,795,292, an increase of £184,775 over 1942.

Expenditures increased by £236,043, to £2,208,351, of which £203,086 represented the higher cost of fuel and wages.

The total net revenue of the Dublin United Transport Co., Ltd., for the year 1943 was £279,711, compared with £271,462 in 1942, and £225,972 in 1941.

Bus Transportation Shows Decrease.—A report issued by the Department of Industry and Commerce of Eire states that in January 1944 the number of miles run by city and suburban bus services totaled 839,000, and passengers carried numbered 11,213,000, compared with 957,000 miles and 11,496,000 passengers in the corresponding month of the preceding year.

Statistics for all internal services in the 26 counties of Eire, exclusive of cross-border services, were 1,442,000 miles (1,531,000 in January 1943), and 13,324,000 passengers (13,331,000 in January 1943).

Gross receipts from passenger fares in the city of Dublin and suburbs in January 1944 totaled £87,954, compared with £90,070 in January 1943, and for all internal services, £157,148, against £152,603.

France

Tariffs and Trade Controls

National Center of Foreign Commerce Created.—A National Center of Foreign Commerce has been created in France, having as its purpose to promote the development of the foreign commerce of continental France, by law No. 524, of September 27, 1943, published in the Journal Officiel (Vichy) of October 2.

The National Center is to assure the liaison, in view of development of French foreign trade, between organization committees, intertrade committees, control supply committees and the like, economic regions, and chambers of commerce, and to coordinate and control the activities of other groups, associations, or organizations interested in foreign trade. It is to constitute common services necessary for this liaison.

It is also to assemble documentation on all questions of foreign commerce, make studies of foreign markets, and propose any measures to further foreign commerce.

It replaces the former Advisory Committee on Foreign Trade, established by the French decree of September 1, 1941.

[See FOREIGN COMMERCE WEEKLY of November 15, 1941.]

Artificial-Wool Fabrics and Articles Continued Dutiable as Made of Wool.—Fabrics and articles made of artificial-wool yarns with a cellulose base (short fibers of viscose, cellulose regenerated with xanthogenate, short fibers of cellulose acetate) will continue dutiable in France as fabrics and articles of woolen yarn, instead of rayon yarn, for an additional period ending September 30, 1944, by an order of September 6, 1943, published in the Journal Officiel (Vichy) of October 3.

[See FOREIGN COMMERCE WEEKLY of March 27, 1943, for previous announcement.]

Metal-Working Industry: Compensation Office and Tax to be Established.—The Organization Committee of Metal Working in France was authorized to create an office intended to assure the payment of trade compensations to member enterprises which have been or are closed by Government orders, by an order of July 18, 1943, published in the Journal Officiel (Vichy) of September 23, 1943.

To supply funds for the operation of this office, a trade tax is to be collected from each enterprise remaining open, amounting to 0.5 percent of their turnover.

French North Africa

Economic Conditions

RESTRICTIONS ON LABOR AND EMPLOYMENT IN FRENCH MOROCCO

Regulations intended to prevent specialized workers from leaving their employment to obtain more remunerative positions were published in the Official Bulletin of French Morocco for February 18, 1944 (dahir of February 12).

Wage-earners (except unskilled) in industrial, commercial, or liberal trades and in certain specialized services, may be hired only through the regular employment offices or, in case no such worker can be supplied by the employment office, subject to the approval of the employment office.

The employer must inform the nearest employment office of the discharge or departure of any worker in these groups. Workers in a business covered by these controls cannot accept employment in another business (even in a noncontrolled business) unless they are provided with a certificate showing that the work contract was terminated by mutual consent or that the worker's departure was authorized by the head of the business.

Tariffs and Trade Controls

Trade-Supply Services and Allocation Bureau Established in French Morocco.—Trade Services, charged with the principal economic activities for supplying the country with essential products, and a Bureau for Allocation of Various Products, charged solely with allocation of products not controlled by Trade Services, were created in the French Zone of Morocco, under the Direction of Agriculture, Commerce and Supplies, by an order of January 5, 1944, published in the Bulletin Officiel of January 14.

The new Trade Services cover: Yarns and fabrics, textile materials, textile industries, hides and skins, foodstuffs, fats, olive oils, fresh fish and fishing, preserves, eggs, fruits and vegetables, and meats.

Commercial Laws Digests

Rise in Tax Rates in French Morocco.—Further increases in the rates of direct taxes in French Morocco have been introduced, effective January 1, 1944, by three dahirs published in the Bulletin Officiel of February 11, 1944.

The first of these, applying to business profits, does not change the rates

Iraq's Novel "Sink Bridge"

A novel movable-span bridge has been devised to provide for the passage of river traffic on the Shatt-al-Arab near Basra, Iraq, reports the foreign press. The bridge submerges 20 feet, instead of swinging or lifting to admit river traffic, leaving a 90-foot by 20-foot channel.

The span is 92 feet in length, has a deck width of 15 feet, and weighs 35 tons. Road and rail traffic passes over the span as the weight normally is taken by two transverse bearing girders at each end. For river traffic, the weight of the span is lifted off the bearing girders by four hoists, one at each corner, from which cables operate over pulleys on overhead steel towers of gantry-like design. The bearing girders can be slid back by hand and the span can then be lowered.

To permit the lowering of the span, the parts of the piers between the hoist towers are recessed and these recesses are spanned by the bearing girders when in position. When the river traffic has passed, the hoists lift the span above the level of the bearing girders, which are slid out across the recesses, and again the span is put in place for resumption of rail and road services.

The bridge is said to be simple in design and operation, the piers are of timber pile construction, and the hoists are operated by hand.

of minimum or maximum taxes, but lowers the amount of profits to which the minimum and maximum rates apply and introduces new intermediate rates. The tax is now based on a standard tax of 15 percent applied on the following basis: On profits below 50,000 francs, 3/15 is taxable; between 50,000 francs and 100,000 francs 4/15 is taxable; betweeen 100,001 and 200,000 francs, 6/15 is taxable; between 200,001 and 300,000 francs, 8/15 is taxable; and between 300,001 and 500,000 francs, 10/15 is taxable. Amounts exceeding the last figure are taxable at the full rate of 15 percent.

The second applies to public and privately paid salaries, indemnities, emoluments, pensions, and annuities at the following rates: 2 percent on the total taxable income below 40,000 francs; 4 percent on that part between 40,000 and 60,000 francs; and 8 percent on any amounts above 100,000 francs. Certain exemptions also are established.

The third dahir establishes the following new and exceptional surtaxes: Land tax, 50 percent of the basic tax; business tax, 50 percent of the basic tax; public and privately paid salaries, indemnities, emoluments, pensions and life annuities, 20 percent of the basic tax; license on sellers of alcoholic liquor, 200 percent on the amount of the basic tax.

[See FOREIGN COMMERCE WEEKLY of October 16, 1943, for the earlier rates of the business profits and income taxes.]

French Moroccan Regulations Regarding Business Changes.—The creation, extension, cession, or transfer of any industrial or commercial establishment in French Morocco was made subject to prior administrative authorization, granted after decision by the chamber of commerce or industry and by the regional chief of the area in which the establishment was to operate, according to articles 9 and 13 of a dahir of July 22, 1943, on economic organization in time of war.

The application of this article has been established by a residential order (arrêté) of December 27, 1943 (published in the Official Bulletin of December 31). Authorizations for the creation, extension, cession, or transfer are given:

1. By the Director of Finances for credit establishments, business agencies, law offices, real-estate offices, and establishments for the manufacture and sale of articles of platinum, gold, and silver;
2. By the responsible administrative chiefs, in conformity with an annexed list (the Bureau of Agriculture, Commerce, and Provisioning, the Bureau of Communications, Industrial Production and Labor, the Bureau of Public Health and Family, or the General Information Service (Cinema), depending on the type of business handled) in the case of manufacturing or large wholesaling establishments;
3. By the regional chiefs for small-scale wholesale or for retail establishments.

The creation of an establishment includes the transformation of a partnership into a corporation, silent partnership, or limited liability company. The extension of an establishment is defined as any modification tending to increase the field of activity or the industrial or commercial capacity of the establishment (such as the creation of a new commercial field, or branches, or agencies, or an increase of more than 20 percent in the equipment or installed power.) Cession is defined as the total or partial alienation of an establishment for a valuable consideration, or gratuitously. Transfer is defined as the removal of the business premises to another locality or to another part of the same locality.

The foregoing provisions are not applicable to such changes effected in industrial or commercial establishments concerning which authorizations have already been provided for by dahirs or orders in effect.

The application for authorization for any of the changes listed shall be submitted in duplicate and addressed by the applicant to the responsible agency or the regional chief, as the case may be. The necessary forms will be available at the Office Cherifien au Commerce Exterieur 72, Rue Georges-Mercie, Casablanca, at Chambers of Commerce and Mixed Chambers, at local control offices.

Germany

Exchange and Finance

New German Loan Type.—In order to make Government bonds more attractive, German finance experts have devised a new type of loan which creates the impression of a very convenient and favorable service from the investor's viewpoint.

The interest rate of 2.5 percent and amortization of 3.5 percent per year have been pooled and are paid to the bondholder as an annuity of 6 percent.

Since the actual value of the bonds thus decreases from year to year, they are quoted in reichsmarks per bond rather than in percent of their par value. For the same reason, the standard bond will have a comparatively high denomination of 10,000 reichsmarks.

The fact that all bonds are redeemed in a uniform way makes them freely interchangeable and is claimed to facilitate their handling by the banks.

Foreign Commerce Weekly Microfilm Service Extended

For several months the Science, Education, and Art Division of the U. S. Department of State has been supplying microfilm copies of FOREIGN COMMERCE WEEKLY to China in carrying out its program of cultural and technical assistance to that country.

It has been brought to the attention of the Editor that this service is to be extended to colleges, universities, and research institutions in *India* and the *Near East*, since the present transportation situation makes it inadvisable to ship the original in the quantities required.

India

Wartime Commodity Controls

Cotton: India to Buy Part of 1944 East African Crop.—A press note issued by the Government of India on February 8, 1944, stated that, as a result of the discussions held at New Delhi between representatives of the Indian, Sudanese, and East African Governments, it has been agreed that the 1944 East African cotton crop, less the quantity supplied to the United Kingdom, should be sold to India at fixed prices.

Imported Drugs and Pharmaceuticals: Downwar Revision of Wholesale and Retail Prices.—Maximum prices of imported drugs and pharmaceuticals, fixed under the Drugs Control Order of November 11, 1943, have been revised, generally downward, and the list of drugs subject to controlled prices has been extended by an order published in the Gazette of India of February 15, 1944.

Wholesalers may not add more than 10 percent and retailers more than 25 percent to the prices charged by manufacturers or importers, as the case may be, of drugs or medicines not included in the new price list.

The period in which dealers might register with the Government expired February 15, 1944, and since that date sellers of drugs or medicines must be in possession of a license from the Provincial Licensing Authority.

[See FOREIGN COMMERCE WEEKLY of January 1, 1944, for the announcement of control of drugs and pharmaceuticals in India.]

Tariffs and Trade Controls

Renewal of Grants for Cottage and Small-Scale Industries.—Grants-in-aid of 100,000 rupees (about $30,000) for the sericulture and cottage woolen industries and 500,000 rupees (about $150,000) for the handloom weaving industry were approved by the Standing Finance Committee of the Government of India on February 19, for the fiscal year starting April 1, 1944. These subsidies date from the fiscal year 1935–36 for the sericulture industry and from 1936–37 for the cottage woolen industry. Grants-in-aid to the handloom weaving industry were initiated in 1934 to offset the higher prices to the handloom weaver of his raw material which resulted from the protective duty on cotton yarns imposed by the Indian Tariff (Textile Protection) Amendment Act of 1934.

Transport and Communication

Civil Aviation to be Developed and Expanded.—A bill which recently passed the Legislative Assembly of India amends the Indian Aircraft Act of 1934 by authorizing the establishment of an Air Transport Board, and prohibiting the operation in India of any air-transport service without a license issued by such a Board.

Plans for post-war development of civil aviation in India include daily schedules on main trunk air lines; link lines to join the main trunk air lines; extension

of main lines to adjacent countries; air-routes of 10,500 miles and a flying mileage of 7,500,000 per year. The flying mileage to be 5 times as great and the ton mileage 15 times as great as before the war. A baggage and freight transport of 12,500,000 ton miles per year is a part of the program and mixed cargo and passenger planes accommodating 12 to 20 passengers.

The international services under study by the Government involve, it is stated, the extension of domestic lines to such places as Rangoon, Colombo, Kabul, Chungking, and possibly cities on the Persian Gulf.

Kenya

Economic Conditions

Public Housing Planned

A central Housing Board is to be appointed by the Governor of Kenya to inquire into and report upon the necessity for dwellings to be erected under the Housing Ordinance promulgated on December 20, 1943. The Ordinance provides for the loan of public funds for the building of dwellings and related incidental construction to any local authority subject to certain provisions.

Funds provided under the Colonial Development and Welfare Act, or voted by the Legislative Council, or by the raising of loans will be used to establish a Housing Fund to finance this proposed development.

Financial assistance under the Colonial Development and Welfare Act is to be made available up to a maximum of £500,000.

Mexico

Economic Conditions

A National Commission for the study of post-war problems has been created by a Mexican executive decree published March 1, 1944. The Commission, under a chairman appointed by the President of the Republic, will be composed of the Ministers or Under Secretaries of Finance, National Economy, Agriculture, Labor, Communications and Public Works, Education, and Foreign Relations, of three members from each house of Congress, and of other persons who, because of their special qualifications, the President may invite to become members.

The Commission will cooperate in international action during the transition from war to peace, and will collaborate in the solution of Mexico's post-war problems. It will function both as a plenary body and through three committees which will deal with international, social-economic, and educational problems. The decree empowers the Commission to enlist the cooperation and facilities of the Federal and State Governments, as well as of unofficial agencies and individuals. The work of the Commission may be published, but only as the opinion of the authors and without the responsibility of the Mexican Government.

Clipper Service Doubled Between Puerto Rico and Trinidad

Local Clipper air service between San Juan, Puerto Rico, and Port of Spain, Trinidad, by Pan American World Airways was doubled as of March 26, providing a 100 percent increase in air service for passengers, mail, and cargo to the populous and storied Caribbean islands between these two terminals.

Previous weekly service in each direction serving strategic Puerto Rico, the Virgin Islands, British West Indies, Guadeloupe, Martinique, and Trinidad was on that date increased to a twice-weekly frequency, utilizing an S-43 type Clipper.

The new schedules are operated southbound on Sundays and Wednesdays and northbound on Tuesdays and Thursdays. On Mondays the same plane continues on to Georgetown, British Guiana, making a round trip, Port of Spain-Georgetown-Port of Spain, every Monday.

These flights are in addition to daily through service in both directions between Miami and Buenos Aires, serving both San Juan and Port of Spain, a weekly all-cargo and mail flight also serving these points (and extending as far south as Belem, Brazil), and a once-a-week round trip between Miami and Georgetown, B. G., which stops at San Juan and Port of Spain both outbound and inbound.

Nyasaland

Economic Conditions

General business conditions in the Protectorate recently were reported to be steady, with trade in the northern Province brisk. Native stores are said to be well stocked with newly arrived consignments of cotton piece goods and other commodities.

Some building activity in Limbe is reported, where the Government is erecting a large warehouse and other buildings for the headquarters of the Native Tobacco Board.

There is little mining in Nyasaland, but it is said that the Mlanje area has been tested for bauxite.

The corundum deposits near Tambani reportedly are being worked with a view to obtaining quick results for war purposes, and development of the mine may be possible on a long-term basis. Kyanite, which is found in Nyasaland, Kenya, and Uganda, is being considered for use in the manufacture of acid-resistant refractory bricks for steel furnaces and glass tools.

At the last session of Nyasaland's Legislative Council, the Governor announced that a Post-War Development Committee had been created in Nyasaland, consisting of the chief secretary (chairman), the financial secretary, six nonofficial members of the Legislature, and the general manager of the African Lakes Corporation.

Agricultural Conditions Spotty

Fertilizers were in short supply during 1943, and Nyasaland has experienced difficulty in obtaining its requirements, particularly of phosphates. All available fertilizer supplies are being pooled and redistributed on a pro-rata basis between Southern Rhodesia, Northern Rhodesia, and Nyasaland, according to a joint agreement last June.

Both tea and tobacco areas have been suffering from drought, but latest reports are that tea yields on most estates are promising.

Tobacco sales during the past season totaled 15,539,000 pounds, which realized £502,000, compared with 15,407,000 pounds valued at £529,000 during the preceding season. Acreage planted to flue-cured tobacco for the coming season is said to be smaller than during the past year, and there is an indication that the dark-fired crop also will be much smaller.

The cotton crop is reported to be the smallest in some years. Less than 3,000 tons of seed cotton is expected to be collected in the Lower River Area and in the Southern Province, and about 350 tons from the North Nyasa crop. The Imperial Government has undertaken to purchase the cotton crops of Nyasaland until 12 months following the close of the war.

The few European-owned rubber estates in Nyasaland are reported to be working at full pressure. Last year's production amounted to nearly 100 tons, and there has been an increase of more than 40 percent in 1943 exports, compared with the preceding year.

An exclusive license is said to have been issued to stimulate the growth of pyrethrum on the Nyaka Plateau of Nyasaland. The crop now being planted is to be grown by natives, with European supervision.

Foreign Trade Increased

Foreign trade during the first 10 months of 1943 reached a total value of £2,349,000. Although exports declined from £1,236,000 in the comparable period of 1942 to £1,226,000, the value of imports rose more than 54 percent, from £727,000 to £1,123,000.

Principal exports in the first 10 months of 1943 were: Tobacco, 16,569,000 pounds, valued at £621,000; tea, 10,366,000 pounds, valued at £475,000; cotton, 2,523,000 pounds, valued at £63,000.

Government Budget for 1944

The Legislative Council has passed the largest appropriation in the history of the Protectorate. A public debt charge of £203,000 was the largest single provision of the appropriation of £938,800, while other important items were public works, £118,000; medical provision, £85,000; pensions and gratuities, £58,000;

Mexico's New Commission for Study of Post-War Problems

A major step in the direction of Mexico's social and economic readjustment to peace and the part the country will play in international affairs after the war has been taken with the creation of the National Commission for the Study of Postwar Problems, recently established by executive order of President Manuel Avila Camacho. The commission is headed by Octavio Vejar Vazquez, former Secretary of Public Education, and will include as ex officio members the Secretaries of Foreign Affairs, Treasury and Public Credit, National Economy, Agriculture and Development, Labor and Social Security, Communications and Public Works, and Public Education.

Other members of the commission will consist of three representatives each of the Senate and House of Representatives and many of Mexico's leading indutrialists, professional men, labor leaders, financiers, businessmen, economists, and Government officials. The new agency is empowered to enlist the cooperation and facilities of other Government agencies in meeting Mexico's domestic and international problems after the war.

The executive order creating the commission stresses the need for cooperative international action in making the transition from war to peace and in arriving at a solution to social, economic, educational, and international difficulties thereafter. It emphasizes the inability of any one nation to solve these difficulties without the aid and collaboration of other nations.

The commission will function as a plenary body or through three main committees handling social and economic questions, educational problems, and international affairs, respectively. The commission as a whole will meet in plenary session at least once a month, and auxiliary agencies will be created to work with state and local governments in post-war planning. Additional committees and subcommittees may be created by executive order as the need arises.

provincial and district administration, £56,000; and agriculture £44,000.

The Government of Nyasaland has lent a further £100,000 free of interest, to the Imperial Government for the prosecution of the war.

Paraguay

Transport and Communication

Railway Reports Increased Activity.—The Central Paraguayan Railway, of Paraguay, reports an increase of 13.5 percent in the total of freight train kilometers run and of 18.4 percent in the number of passengers carried in 1943. The quantity of freight transported increased from 160.167 metric tons during 1942 to 196,662 metric tons for 1943, an improvement of 22.8 percent.

Financial returns for the Railway are available only for the year ended June 30, 1943. These reflect an improvement in gross receipts to 216,383,648 paper pesos from 189,565,951 for the preceding annual period. Operating expenses increased to 179,383,463 pesos from 151,608,989.

Southern Rhodesia

Tariffs and Trade Controls

Duty on Rice Bran Suspended.—The suspension of the full import duty on rice bran in Southern Rhodesia was announced in the Government Gazette for November 12, 1943.

The general duty on rice bran before suspension was 2 shillings per 100 pounds.

Spain

Tariffs and Trade Controls

Luxury Tax Abolished on Various Articles.—The Spanish luxury tax of 20 percent ad valorem on radio-receiving sets, lighting apparatus, portable or not, and billiard tables was abolished and these articles made subject to the use and consumption tax of 5 percent ad valorem by a decree of December 17, 1943, published in the Official Bulletin of January 1, 1944, and effective from the date of publication.

Use and Consumption Taxes Established on Radio Sets.—Radio receiving sets (except crystal sets) in operating condition held in Spanish territory by any private person or organization, Spanish or foreign, were made subject to a use and consumption tax of 30 pesetas to 200 pesetas per annum, according to the size and location of the set, with an additional annual tax of 500 pesetas for each radio loudspeaker installed on a public street, by a decree published in the Official Bulletin of January 1, 1944.

Radio sets privately owned by foreign diplomatic representatives are exempt from this tax, on a reciprocal basis.

This tax replaces the former operating permit tax for radio sets originally created by a royal decree of February 8, 1917.

Union of South Africa

Exchange and Finance

The prosperity which South African agriculture is enjoying is indicated in the annual report of the South African Land and Agricultural Bank for the year 1943. In its report, the Bank emphasizes the high prices being paid for farm land—prices which have undergone and are undergoing a sharp upward trend, the tendency on the part of farmers to obtain long-term financial requirements on a short-term basis from sources other than the Land Bank, and the high rate of capital repayments to the Bank during the past year.

At the end of 1943, the capital amount owed to the Bank for mortgage, fencing, dipping tank, water supply, silo, and cash-credit advances to individual farmers was nearly £18,700,000. The total arrears in interest and capital payment was only £200,000 representing but 1.1 percent of the capital invested. This is an improvement over last year, when the percentage was 1.4, and is the lowest figure for arrears since the end of 1929. This low percentage of overdue payments is said to indicate the general prosperity among the farming population.

The high rate of capital repayment continued throughout the year. Although there was a rise in long-term advances during this time, repayments still exceeded the demand. Accordingly, Parliamentary appropriations for the Bank's purposes have not been used but have been surrendered to the Union Treasury.

Government advances made under section 20 of act No. 39 of 1933, which were in the nature of relief measures during the depression years from 1933 to 1936, have ceased almost entirely. In 1943 they amounted to less than £3,000 of which 3.9 percent was overdue. Fixed and seasonal loans to cooperative organizations exceeded £7,700,000.

The Land Bank has a capital of slightly over £20,000,000 and administers funds in excess of £30,000,000. The institution was established in 1912, with a capital of £2,800,000. It has been suggested that because of the large amount of funds seeking investment in the Union the Bank should reduce its rate of interest, but to this the Bank points out that its long-term advances are made for a period of 38 years, at a fixed rate of interest which can neither be raised nor lowered during the life of the loan. Furthermore, it is stated, the rate charged at present—4½ percent—depends upon the rate which the Bank must pay the Government for its long-term funds which is fixed at 3½ percent. This leaves the Bank a 1 percent margin to cover administrative costs.

Shares Rise on Stock Exchange, Yields Decrease.—The total market value of securities quoted on the Johannesburg Stock Exchange had increased by nearly £275,000,000 on September 30, 1943, compared with the value in the preceding year, according to information made public by the chairman of the exchange in December. The value of the securities was £1,073,000,000 at the end of last September and the earlier figure was £799,400,000. This increase was largely a result of a rise in gold-mining stocks from £336,000,000 to £458,000,000.

(Continued on p. 43)

Commercial Intelligence Plays Major Wartime Role

(Continued from p. 4)

able extent, qualified nationals will be given a greater degree of preference in suggestions to American businessmen seeking representation.

Considerable information is being obtained from commercial travelers who are calling on Foreign Service Officers as well as those who send information by letter to the Bureau in Washington. We continue to learn what American or other foreign lines are being handled by firms which are equipped to serve a specified sales area and have facilities for taking on additional lines.

Guides have been sent to the foreign Missions, together with exhibits of types of work that will enable our exporters and importers as far as possible to obtain the cream of distributors and sources of supply.

Replacement Program

The program of replacing American lines which were displaced as a result of economic-warfare activities and Proclaimed List implications has been carried along all through the war and is continuing in full force and effect. There is good reason to believe that most American concerns which have been affected in this respect have been able to get good service, although it is patent that satisfactory replacements are not *always* available for firms that have become ineligible. Nevertheless, the backlog in this work is practically nil, and there is no reason why prompt service in this respect cannot be given to American foreign traders.

In this replacement program, there is another consideration which concerns replacing with American lines those commodities that have heretofore not been obtained from the United States. Most foreign traders have probably heard of this work in connection with the drug industry, and are doubtless aware of the extent to which American merchandise, in this whole field, is now becoming the standard instead of the former German medicinals.

Considerable work has also been done in the machinery and hard-goods trades, although many of those lines are still in such short supply as not to be able to take immediate advantage of this program. One feels that we should continually strive to regard the replacement program as *not* being merely the matter of replacing a single representation for a particular firm but *also* as encompassing the larger project of replacing Axis lines entirely with American products. This is not a suggestion for post-war planning: It is a *pre*-post-war operation in which we are currently engaging, and most of the groundwork has been laid.

Strongest Link

It has always been this writer's belief that the agency chain is the strongest of all the factors in foreign-trade promotion. It is through agents and distributors that we provide the links which *make* the entire chain of foreign trade. Commercial intelligence, as we know it in the United States, is the commodity that makes possible the forging of these links.

The American exporter who has established agencies and distributorships abroad is in the excellent position of having current marketing, financial, and economic information at his fingertips, utilizing the services of his Government largely for commercal policy and planning.

Scandinavian Pulp and Paper Industries

(Continued from p. 11)

Norway's Production and Exports

[Figures in short tons]

Woodpulp and groundwood			
Item	1937	1938	1939
PRODUCTION			
Bleached and unbleached sulphite	527,521	442,446	[1] 545,637
Bleached and unbleached sulphate	81,437	59,466	
Mechanical groundwood	598,959	489,901	518,081
Total	1,207,917	991,813	1,063,718
EXPORTS			
Total to world's principal markets	723,516	565,761	606,650
Great Britain	351,879	312,236	306,358
United States	92,622	70,913	97,820
France	87,265	57,805	[2] 50,471
Japan	57,626	21,025	26,345
Belgium	32,083	18,964	29,585
Netherlands	26,382	23,733	36,623
Brazil	[2] 14,522	[2] 7,671	[2] 6,816
Italy	12,733	9,684	15,978
Germany	12,219	8,958	8,519
Sweden	[2] 7,008	[2] 1,790	1,374
Mexico	4,118	2,996	3,818
Czechoslovakia	3,078	1,357	285

Paper and paperboard			
Item	1937	1938	1939
PRODUCTION			
Newsprint	209,538	176,618	n. a.
Wrapping, all types	150,714	105,536	n. a.
All other papers	71,544	74,040	n. a.
Paperboard	55,703	44,922	n. a.
Total	487,499	401,116	n. a.
EXPORTS			
Total to world's principal markets	379,981	281,918	355,680
Great Britain	110,244	80,685	111,608
Argentina	40,175	26,744	32,083
Denmark	23,682	16,750	16,443
China	22,366	9,010	9,103
United States	19,362	13,107	43,955
Belgium	17,351	15,262	10,969
Brazil	12,923	16,092	15,172
France	11,559	7,771	1,527
Portugal	9,524	7,144	8,175
Uruguay	8,990	9,270	6,688
Netherlands	8,420	9,824	8,975
Colombia	2,611	4,556	5,507

[1] Figure constitutes all types of chemical pulp; no classification to be had.
[2] Figure includes soda pulp. Wet pulp converted on basis that 2 tons wet equals 1 ton dry pulp.
n. a.: Not available.
Sources: Norway—Commerce 1937, 1938, 1939, Statistisk Arbok for Norge, 1937, 1938, 1939.

News by COMMODITIES

Beverages

Swedish Consumption of Soft Drinks

Despite Sweden's long, severe winters and short seasons of warm weather, the consumption of carbonated soft drinks is relatively high.

The most popular carbonated soft drink in Sweden is Sockerdricka, which is merely sweetened carbonated water, sometimes flavored with citric acid or ginger. The different orange drinks and the so-called champagne types rank second and third, respectively, and the lemon and the berry types are fourth. The apple soft drinks do not enjoy the same popularity as the foregoing varieties.

Julmust and Vegamust, two very sweet soft drinks, although sold only during the Christmas and Easter seasons, are very popular.

The production of carbonated soft drinks is not classified separately in official statistics. Thus, the following table shows production of both mineral water and carbonated soft drinks during the period 1930 to 1939:

Year	Quantity	Value
	Liters [1]	*Crowns* [2]
1930	44, 766, 115	18, 216, 705
1931	44, 068, 607	16, 816, 348
1932	46, 012, 957	17, 162, 125
1933	44, 256, 429	16, 117, 252
1934	48, 611, 007	17, 225, 323
1935	53, 476, 593	18, 614, 368
1936	57, 815, 855	20, 246, 633
1937	65, 532, 872	23, 049, 103
1938	73, 322, 214	25, 536, 222
1939	80, 358, 971	25, 567, 509

[1] liter = 1.0567 liquid quarts.
[2] Current pegged rate of exchange 4.20 crowns to $1 in United States currency.

Official production figures for the years 1940, 1941, and 1942 have not been published, but reliable trade sources report that the manufacture of soft drinks has increased steadily.

Practically all soft drinks are sold in Sweden in bottles containing one-third of a liter. The only exception is Sockerdricka which, in addition to this size bottle, is sold in 0.8 liter bottles. (This size is used also for mineral and carbonated waters.) The size and the shape of the bottles used are standardized; the one-third-liter bottle is made of white glass, while the 0.8 liter bottle is made of dark green glass and is equipped with a mechanical rubber stopper.

Retail prices in Stockholm of the most popular soft drinks vary from 0.28 to 0.41 crown for a bottle containing one-third of a liter.

One popular drink, Svagdricka, is not carbonated. It is a non-alcoholic malt beverage, having quite a sweet taste but not so sweet as Julmust and Vegamust. This beverage is made principally by the small soft-drink bottling plants. It is bottled in 1, 5, and 10 liter bottles and is sold for about 0.33 crown per liter.

The present Government tax is 0.12 crown per liter. This is paid by the bottling plant on a monthly basis, with a minimum amount of 50 crowns per month.

An import duty, also 0.12 crown per liter, is imposed on mineral water and carbonated soft drinks.

Most of the principal accessory items used by the Swedish soft-drink industry, including bottles and caps, are made in Sweden. Soft-drink bottling plants require the return of empty bottles at the time new purchases are made, and bottles, therefore, are generally available.

The most common bottle cap in Sweden is the Alka aluminum cap; efforts to introduce the crown cap have been unsuccessful so far.

Citric, tartaric, and lactic acid used in the soft-drink industry must be imported. Before the war large quantities were received from the United States, but since the war France, Italy, and the Netherlands have been the principal sources of supply. Caramel coloring and carbonic-acid gas are obtained locally in plentiful supplies.

There are no official statistics showing the consumption of soft drinks in Sweden. However, judging from production, imports, and exports of mineral water and carbonated soft drinks, the per capita consumption increased from about 7.25 liters in 1930 to 12.64 liters in 1939. According to trade sources, this increase has continued during the years of the war, but no figures are available. It is reported that this increase in consumption has been greatest with respect to carbonated soft drinks, while the consumption of artificial mineral water has decreased to a certain extent and consumption of natural mineral water has remained practically unchanged.

Efforts have been made on several occasions to introduce soft drinks having other flavors. A drink called Colanil, resembling in taste the popular cola drinks, was put on the market a few years ago. It did not become popular, however, despite the fact that the distribution was supported by an extensive advertising campaign. The same thing happened in the case of Baric, a soft drink having a menthol flavor. This soft drink is still available, but sales remain small.

Imports and exports of soft drinks have been comparatively small. It is difficult to state whether United States soft drinks could become popular in Sweden. United States motion pictures, styles, and songs are very popular, and it is possible that if a United States company introduced a soft drink on the Swedish market, sponsored with an appropriate and intensive advertising campaign, it might be favorably received.

Sweden's New Self-Righting Lifeboat

A covered lifeboat, said to be unsinkable and self-righting, has been developed in Sweden. The first model was built about 2 years ago, and an improved model was recently demonstrated to shipping experts at Marstrand.

The boat was submitted to a number of capsizing tests before the trial runs, and it righted and baled itself immediately after being rolled over with a crane. The boat made about 6 knots under power in smooth water, and good steering speed was made in a light wind under sail.

The new lifeboat is built of galvanized steel plate, is powered with a 10-horsepower Bolinder engine, and has 2 masts for sails. There are holds for oil, water, and other supplies. It is 7 meters long and 1.15 meters deep; moulded breadth is 2.60 meters; and draft when loaded is 0.87 meters.

Chemicals

Chilean Nitrate and Iodine Sales

The Lautaro Nitrate Co. of Chile reports that its average sales of iodine during the 4 war years have been 30 percent greater than those in the 4 years immediately preceding the war, according to the foreign press.

Chilean nitrate producers have not experienced any great increase in nitrate sales during the war, inasmuch as a larger demand from some markets has been offset by the closing of others.

French Moroccan Fertilizer Situation

Chemical fertilizers were used only in limited quantities in French Morocco before the war. About 4,000 tons each of nitrogenous and potassium fertilizers were consumed annually, and approximately 40,000 tons of phosphates (including between 30,000 and 35,000 tons of superphosphates) were required.

Imports of nitrogenous fertilizers were immediately cut off at the outbreak of the war, and since that time only small amounts have been received. Reserves of potassium fertilizers were sufficient to meet requirements until the end of 1943.

Superphosphates are produced in French Morocco, but the output has been limited by shortages of iron pyrites. However, additional supplies of pyrites have been received, and about 15,000 tons of superphosphates, or approximately 50 percent of present domestic needs, probably will be manufactured locally in 1944.

Peruvian Sulfuric-Acid Consumption

Peruvian requirements of sulfuric acid total approximately 6,500 tons annually and are supplied from copper-smelter operations by the Cerro de Pasco Copper Corporation at Croya. The sulfur dioxide obtained is used in manufacturing byproduct sulfuric acid.

The company requires 3,000 tons of sulfuric acid for its own operations; an additional 2,500 tons are used locally for bleaching vanadium ores, and 450 tons in refining petroleum. Other Peruvian industries consume several hundred tons.

The demand for sulfuric acid is expected to increase slowly as production expands at the copper-sulfate plant established in 1940 by the Enrique Ferreyros concern.

Swedish Fertilizer Industry

Greater domestic production of nitrogenous fertilizers has been urged in Sweden, the European press reports.

Abundant supplies of electric power are available, and a large fertilizer industry would furnish employment to a great many people, it is stated.

Swedish imports of nitrogenous fertilizers totaled 35,000,000 crowns in 1939.

Steel Works for Soviet Uzbekistan

The approaching completion of the first iron and steel works in Soviet Uzbekistan on the banks of the Syr Darya is reported in the foreign press.

The shops reportedly are arranged to secure the shortest and most convenient oil and steam-feed lines, railroads and truck lines, both for present requirements and for future additions.

The plant is said to be an example of the use of local building materials. A rigid framework of reinforced concrete was used for the open-hearth furnace shop and for the outer columns of the foundry. Iron and brick construction was employed for the rolling mill, the heat and power plant, and the gas-generating station. The problem of suitable roof timbers was solved by building thin brick arches to support the main roof members.

Coal, Coke, and Fuel Gases

Argentine Coal Industry

Coal production, which did not begin in Argentina until 1934, totaled 709 metric tons in 1938, 2,794 tons in 1939, 20,000 tons in 1941, and 50,000 in 1942. Of the estimated 115,508 tons produced in 1943, 106,380 tons were common asphaltite, 1,502 tons were pure asphaltite, and 7,262 tons were coal.

Most of the solid fuel mined in Argentina is not true coal. Shales of petroleum origin have been subjected to great pressure, forcing their liquid and semiliquid contents into new beds, generally into cracks or easily occupied regions in the rocks. The deposits, usually extensive, are often inclined to almost a vertical position.

Argentine coal resembles true coal superficially, but can be distinguished by its greater luster and brittleness. It burns with a bright flame which does not flicker, throws out a great deal of smoke, and yields quantities of gas of acid reaction. Asphaltite is low in water content, low in ash production, has high solubility in benzine and bisulphide of carbon, and is high in calorific value. Asphaltites fall into two general classes, common and pure. Pure asphaltite, the only type exported, is produced in commercial quantities at only two mines, both of which are in the Territory of Neuquen.

Some of the coal produced in Argentina is so pulverized that it cannot be burned in small furnaces or railway locomotives unless manufactured into briquets. This has not yet been undertaken on a commercial scale.

Even a rough estimate of reserves is not possible, inasmuch as there has been little exploration, but superficial deposits alone contain an estimated 300,000,000 tons.

Most of the mines lie in the foothills of the Andes, far from railheads, and the problem of transportation is the principal obstacle to mining at this time. The coal must be hauled to the railheads by truck, and, because of the steep, rough roads to be traveled, the load must be limited to 5 or 6 tons. Transportation charges are high, and the supply of trucks is limited. The building of roads and railroads is receiving attention, however.

Although the coal industry is new in Argentina, it is thought that its future is promising, particularly in the field of distillation and the production of byproducts. Authorities who consider the burning of Argentine asphaltite wasteful are hopeful that the necessary plant equipment may be imported after the war.

Australian Plants Converting Grain Into Power Fuel

The first of Australia's new distilleries to convert grain into fuel was opened in New South Wales in December 1943, states the foreign press. It is believed that the plant is the first commercial-sized one of its type in the world. More than 3,000,000 gallons of power fuel will be produced each year from approximately 1,250,000 bushels of wheat. The other three distilleries, each of the same capacity, are expected to come into operation at 4-month intervals in Victoria, South Australia, and Western Australia, respectively.

Brazilian Coal Production

Imports of coal into Brazil in 1942 fell to 616,000 tons from 1,707,852 in 1937; importers are required to buy Brazilian coal to the extent of 20 percent of the quantity imported, the foreign press reports.

Steps are being taken to adapt furnaces and boilers to Brazilian coal, the main objections to which are its low calorific value and high fusible-ash content. Production in 1942 totaled 1,757,000 tons, representing a 224-percent increase in 10 years. The greatest quantity, 1,315,000 tons, was produced in Rio Grande do Sul, but the calorific value of this coal is not so high as that from Santa Catharina, the source of 433,000 tons in 1942. Many Brazilian States have coal of higher calorific values than that of Rio Grande do Sul, but production is hindered by inadequate transportation.

For the duration of the war, the distribution of coal has been placed under the control of the Mercantile Marine Board.

Chilean Coal Situation

Coal production in Chile rose to 206,027 gross metric tons in December 1943 from the 201,891 gross metric tons reported in November.

Action taken by the Chilean Coal Rationing Committee in January included provision for the coal needs of the forthcoming winter season, the appointment of a committee to study the making of briquets with a view to utilizing all the fuel produced in Chile, and the denial of authorization to export fine coal in any large quantities.

Sales of Southern Rhodesian Colliery

The Wankie Colliery Co., Ltd., of Southern Rhodesia, in its report for the year ended August 1943, shows coal sales amounting to 1,515,973 tons compared with 1,282,939 tons in the preceding year. Sales of 75,683 tons of coke represented a decrease of 7,834 tons from the total for the preceding year.

Coal Production in U. K.

Production of a weekly average of 3,769,000 tons of coal in the United Kingdom in the 4 weeks ended February 19, 1944, represented an increase of 273,500 tons a week over the preceding period and a weekly decrease of 247,400 tons from production in the comparable period of 1943.

Construction

Activity in Cuba

Construction activity in Cuba in 1943 was at quite favorable levels, despite building-material shortages. It was reported that during the last half of the year shortages were less acute than in the first half.

The National College of Architects, which includes as members practically all important architects, reported that they handled 1,552 jobs in Habana and vicinity in 1943, compared with 1,308 in 1942. Expenditures on these jobs totaled 14,483,873 pesos, an increase over the 12,649,134 pesos of the preceding year.

Building Industry, Montevideo, Uruguay

Much concern is expressed in Montevideo, Uruguay, over the inactivity of the building industry as compared with former years. While building permits

issued in January 1944, totaling 979,120 pesos, were an increase over the 668,000 pesos spent on construction in January 1943, there was a drop of more than 672,000 pesos compared with December 1943.

Electrical Machinery and Equipment

Argentine Electricity Consumption

Electrical energy sold in Argentina averaged 184,000,000 kilowatt-hours monthly during the first 6 months of 1943, according to figures published by the League of Nations. This was a substantial increase over 1941 and 1942 monthly averages of 169,000,000 and 178,000,000 kilowatt-hours, respectively.

Electricity Consumption in Cuba

The Compañía Cubana de Electricidad, which supplies approximately 95 percent of the demand in Cuba, reports increases in the use of electrical energy in 1943 by all classes of consumers except government and municipal. Customers increased in number from 274,375 in 1942 to 286,258 in 1943, and electricity production increased from 322,749,000 to 334,704,000 kilowatt-hours.

Power Consumption, Wellington, New Zealand

Because of a power shortage on North Island, New Zealand, the weekly quota of the city of Wellington for 1942–43 was set at 2½ percent above consumption in the corresponding week of the preceding year. Despite every endeavor the amount was exceeded, however, the foreign press states.

The city consumed 135,600,000 kilowatt-hours during 1942–43, an increase over the 128,900,000 kilowatt-hours used in 1941–42. The maximum demand rose from 35,312 to 36,488 kilowatts and the load factor improved from 45.8 to 46.6 percent.

Hydroelectric Station Under Construction, U. S. S. R.

Construction has been started on the first powerful hydroelectric power station in the Andizhan oblast in the Soviet Union on the bank of the Sharikhansai River. It will be built by the "popular speed method," a term applied to construction and irrigation projects that rely on the mass help of the local population where physical labor is required.

Foodstuffs and Allied Products

Coffee and Cocoa

Cocoa Crop, Dominican Republic

Stocks of cocoa in the Dominican Republic as of January 30, 1944, were approximately 6,500 metric tons. February production totaled approximately 2,000 metric tons, according to the trade.

The quality of the winter cocoa crop reportedly is good. As a result of the severe drought in the northern part of the Republic, the current crop will not be as large as at first expected; it is now estimated at 7,500 metric tons instead of 9,000 tons as estimated earlier in the season.

Stocks on hand as of March 1, 1944, were estimated at 5,600 tons. Although exports during February 1944 were less than in the preceding month, exporters are satisfied with present shipping facilities and expect to have all stocks on hand cleared by April 15. Prices to producers are averaging $5.80 per 50 kilograms.

Ecuadoran Cocoa Industry

February is an off-season month in the Ecuadoran cocoa industry. Such cocoa as is delivered to the local market and for export in February is the end of last year's crop.

February deliveries to the port of Guayaquil totaled 15,015 quintals of 101.4 pounds. This was below the corresponding month in 1943, when 23,715 quintals were delivered, but was about equal to normal February deliveries.

About 64 percent of all the cocoa exported from Ecuador in February 1944 was absorbed by the United States, the remainder going to Colombia, Bolivia, Chile, and Argentina.

During the first 2 months of 1944 cocoa deliveries at the port of Guayaquil totaled 27,510 quintals, a decrease of 39 percent as compared with 45,156 quintals in the corresponding period of 1943.

Peruvian Coffee Production

Peruvian coffee production in 1943 was estimated at 89,000 quintals of 46 kilograms each, or approximately 4,094 metric tons, of which 54,000 quintals was classified as export type and 35,000 quintals as second-grade coffee.

Peruvian coffee consumption in 1943 has been estimated at 55,000 quintals, an increase of about 5,000 quintals over 1942.

WFA Requisitions Black Pepper

The War Food Administration announced recently that it has requisitioned in the New York metropolitan area, approximately 6,500,000 pounds of black pepper from importers and holders in order to supply essential U. S. civilian and military requirements and export commitments.

There is enough black pepper in this country for these needs until about 1946 under the present system of distribution, WFA officials point out. Importers, however, have withheld stocks from sale to spice grinders and packers in the hope of obtaining adjustments in ceiling prices. As a result, grinders and packers have been unable to obtain sufficient quantities to operate under current quotas as provided under the present food order (FDO 19), which controls the distribution of pepper and other spices.

The WFA will offer the requisitioned pepper at ceiling prices to grinders and packers on the basis of their stock position in relation to their quota under the food order.

Pepper stocks in this country are not expected to be greatly replenished until after the war, as most of the spice is normally imported from the Netherlands Indies now occupied by the Japanese.

Dairy Products

Canadian Output

Dairy-products output in the Province of Alberta, Canada, reached a new high value of $34,181,500 in 1943, surpassing the previous record of $34,000,000 in 1920.

A record for dairy production also was established in Saskatchewan, inasmuch as the value in 1943 totaled $33,585,000, or approximately $3,000,000 over the 1942 total.

The output of creamery butter in Saskatchewan totaled 47,721,150 pounds, representing an increase of 15.5 percent over 1942 production.

The production of ice cream in Prince Edward Island, totaled 80,671 gallons in 1943, a gain of 16 percent over 1942 production of 69,402 gallons, according to the Dominion press.

Butter Situation in Eire

Stocks of creamery butter held in public cold storage, at creameries, and at merchants' premises and butter factories in Eire amounted to 75,638 hundredweight (8,471,456 pounds) on February 15, 1944, compared with 95,191 hundredweight (10,661,393 pounds) on January 31, 1944. Factory and other butter stocks totaled 11,797 hundredweight (1,321,264 pounds) on February 15 and 13,911 hundredweight (1,558,042 pounds) on January 31.

Production of creamery butter during the period February 1 to February 15, 1944, was approximately 2,867 hundredweight (321,100 pounds). Public cold-storage houses received 12 hundredweight (1,344 pounds), while withdrawals therefrom totaled 15,706 hundredweight (1,759,072 pounds) during that period.

Iranian Wheat and Barley Situation

Wheat and barley are the principal grains grown in Iran, though small quantities of rye, oats, and corn also are produced.

Reliable statistics on the production and consumption of grain in Iran are not available, however, inasmuch as most of the land under grain cultivation is owned by small growers who retain the grain for their own consumption. The following figures are rough estimates arrived at from information obtained from the Cereals and Bread Section of the Iranian Ministry of Finance and opinions of officials of the Ministry of Agriculture.

Iran's grain crop during the year ended March 21, 1944, is estimated at approximately 3,500,000 metric tons, which represents a sizable increase over estimates made earlier in the year.

Land under wheat cultivation is estimated at between 1,600,000 and 1,800,000 hectares (1 hectare=2.471 acres), as compared with 1,100,000 to 1,400,000 hectares for the preceding year. Wheat production is estimated at 2,000,000 metric tons, against an estimated 1,200,000 tons in the year ended March 20, 1943.

It is estimated that from 700,000 to 900,000 hectares were planted to barley in the year ended March 21, 1944, whereas during the preceding year only slightly more than 500,000 hectares were utilized for barley cultivation. The Cereals and Bread Section estimates barley production at 1,000,000 metric tons, against an estimated production of about 560,000 tons for the year ended March 20, 1943.

The total consumption of wheat in Iran cannot be estimated, although most of this crop is utilized for making bread and none is exported. The Cereals and Bread Section estimates that approximately 230,000 tons will be required to feed the principal urban centers of Iran, for which the Government insures the bread supply, and it is understood that 400,000 tons of the present crop will be used for seed.

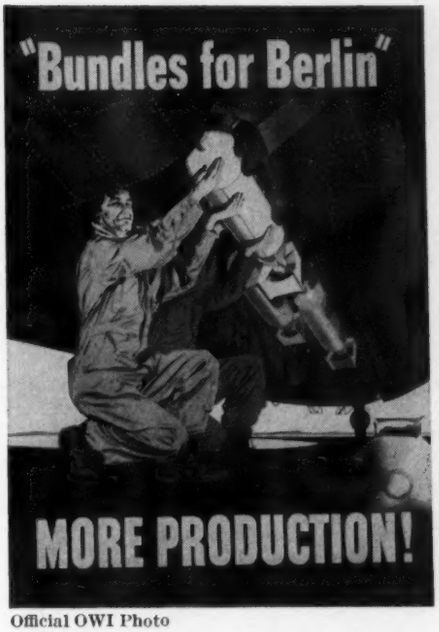
The largest part of the barley crop is used for animal feed, and it is estimated that about 650,000 tons of the current year's crop will be so utilized. With the increase in the use of barley for bread making, however, a relatively greater quantity probably will be used for this purpose during the current year, particularly in the urban areas, where it is estimated that about 75,000 tons will be required. Approximately 200,000 tons of the current year's crop are expected to be used as seed.

Domestic trade in wheat and barley is a monopoly of the Iranian Government and transactions in, and the transportation of, these products, other than between villages, is illegal.

During the past 6 months there has been a significant shift toward the use of barley instead of pure wheat for bread making. This is particularly noticeable in the urban centers, where bread was formerly made almost exclusively from wheat. This trend has been deliberately engendered, so as to guarantee the urban centers an adequate supply of bread, and it is likely that it will become even more marked in the future, as a result of the relatively higher price now paid for barley and the consequent increase in barley plantings in relation to wheat plantings.

There have been no imports of wheat and barley for the Iranian Government during the past 6 months. Moreover, the Cereals and Bread Section does not feel that grain imports will be required during the next 6 months, although the Middle East Supply Center has held in reserve 10,000 metric tons on the possibility that it might be needed.

It is possible that a certain quantity of wheat from the Zahidan area will be exported to India in return for an equivalent quantity which would be furnished by the Middle East Supply Center at a Persian Gulf port. This is not an import-export transaction, however, since it would merely be an exchange of equal quantities of wheat and would be dictated solely by transport conditions.



Official OWI Photo

Although reliable figures are not available, it is estimated that about one-half of the total production of wheat and barley is in the hands of the growers. The recent, sharp fall in the free market prices for grain indicates that fairly large stocks are on hand in the rural areas. The proportion of barley stocks to wheat stocks has increased this year over previous years and it is reasonable to suppose that this trend will continue.

Meats and Products

Argentine Hog Market

Receipts at hog markets in Argentina during the last quarter of 1943 totaled 715,600 head, a record compared with the fourth quarter of past years, but below receipts in the third quarter of 1943 when 861,300 head were sent to market.

As a result of the drought and the short corn crop, there was a tendency toward light-weight animals and reduced hog numbers in the non-corn-producing districts.

Hog marketings in Argentina in 1943 totaled 2,997,300 head, according to preliminary figures, as compared with 2,085,100 in 1942, 1,411,300 head in 1941, and 906,300 head in 1940.

French Moroccan Livestock Position

The French Moroccan livestock position at the beginning of 1944 was not particularly good. The average weight of animals delivered at Casablanca for slaughter in 1943 was much lower than in 1941. In that year, 30,310 cattle, whose average weight was 144 kilograms (1 kilogram=2.2046 pounds), were delivered for slaughter, compared with 50,459 cattle averaging 115 kilograms in 1943.

The following figures are reported for other types of animals:

Animals	1941		1943	
	Number	Average weight	Number	Average weight
		Kilograms		*Kilograms*
Sheep	162,937	15	43,199	12
Goats	11,095	10	2,142	7.6
Hogs	22,116	90	36,693	88

Sugars and Products

Cuban Products Available for Export

Sugar, molasses, and distilled products available for export from Cuba from the 1944 sugar crop probably will exceed $300,000,000, as compared with about $252,000,000 from the 1942 crop and $189,000,000 from the 1943 crop.

The approximate value of Cuban sugar, molasses, and distilled products for export from the 1942 and 1943 crops and the estimate for 1944 are shown in the following table:

[In millions of dollars]

Product	1942	1943	Estimate for 1944
Raw sugar	[1] 189.7	159.8	222.6
Refining charge [2]	4.3	4.3	4.3
Molasses:			
Invert	35.6	.....	40.0
Blackstrap	21.2	.....	[3] 9.1
Industrial alcohol	.....	.....	[4] 13.3
Beverages, alcoholic	1.4	[5] 25.0	21.5
Total	252.2	189.1	310.8

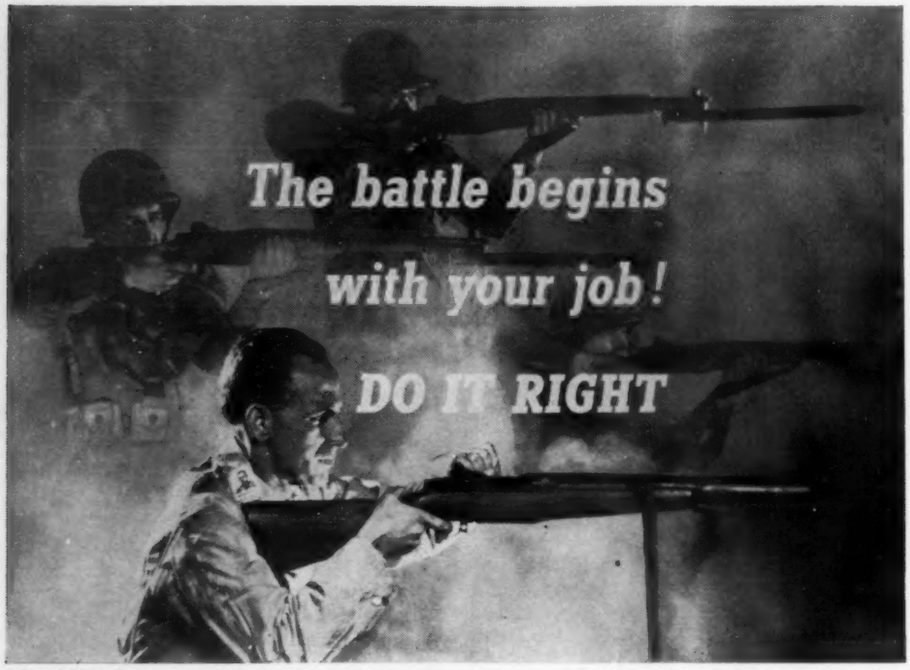
[1] Includes $3,100,000 worth of sugar available for export but not purchased by the U. S. Government.
[2] The refining charge represents an approximate increase in value through exporting 375,000 short tons in the form of refined sugar.
[3] Includes approximately $300,000 additional value through shipping blackstrap with a sugar content in excess of 52 percent.
[4] The value of industrial alcohol is the maximum authorized and may not be attained.
[5] Alcoholic-beverage exports in 1943 are estimated at $25,000,000.

Alcoholic beverage exports in years prior to 1943 totaled slightly more than $1,000,000 annually. The average value of exports of all distilled products during the 10-year period 1933 to 1942 was slightly less than $1,500,000 per year. In 1943, however, beverage exports increased very sharply. On the basis of shipments during the first 11 months, exports for 1943 are estimated at approximately $25,000,000.

Eire's Sugar-Beet Crop

More than 700,000 tons of sugar beets were produced in Eire during the 1943 season. The average yield of approximately 9 long tons per acre shows a substantial increase over the 7.3-ton average in 1942.

The Irish Sugar Co. has guaranteed the price of the 1944 sugar-beet crop at 80 shillings per long ton (net factory weight) for beets having a sugar content of 17.5 percent, with a premium or discount for each one-tenth of 1 percent above or below 17.5 percent.



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Hardware

Guatemalan Situation

Little hardware is manufactured in Guatemala. Some bolts and machétes are made, but, generally speaking, the hardware used there is imported.

During the period 1936–42, hardware represented approximately 16 percent of Guatemala's total imports. In 1939 (considered the last pre-war year), hardware imports exceeded every other class of manufactured products, raw materials, and foodstuffs, except the textile group.

Though a number of countries supplied Guatemala with hardware before the war, Germany and the United States were the most important sources. In 1939, total hardware imports were valued at $3,849,000; 47.12 percent was supplied by Germany and 49.41 percent by the United States. In subsequent years, the United States share of the market has been more than 90 percent. Germany's favorable position before the war was largely due to the low prices and liberal credit terms offered.

The United States has dominated the general hardware field since 1938, and the builders' hardware field since 1939. Germany supplied large quantities of builders' hardware prior to that date and also was the principal source of kitchen and household wares.

Imports of hardware—particularly builders' hardware—from Mexico have been increasing in recent years, and Mexican enamelware likewise has appeared on the Guatemalan market. Kitchen and household ware have been obtained also from Yugoslavia, France, the United Kingdom, and Japan.

While actual figures of hardware sales in Guatemala are not available, it has been estimated that the accumulated unsatisfied normal demand for hardware may amount to $5,000,000.

Iron and Steel

Swedish Iron-Ore Situation

A plea for reduced exportation of iron ores from central Sweden, with a compensating increase in exports of Lapland ores, has been made in a Swedish economic journal. Particular emphasis is placed on low-phosphorous ores and manganese-containing iron ores, important to the Swedish steel industry.

The amount of ore reserves is not known, but it is estimated that for every meter excavated in an iron-ore area of 405,000 square meters, an amount of ore containing 465,000 tons of iron can be obtained, after a deduction of 10 percent for mining losses. Sinkings in recent years average between 5 and 6 meters annually, but in certain instances have been as much as between 20 and 25 meters.

Assuming that known ore areas may be sunk to an average depth of 500 meters, it is estimated that 40 percent of the ore reserves are already exhausted. A thorough prospecting job was done years ago by peasants who scanned all areas accessible to them, but newer prospecting methods have revealed deposits of considerable extent. Several abandoned mines have been reopened and there have been recent discoveries in known ore areas. Reserves of the Persberg area, estimated several years ago at 1,500,000 tons, were revealed by later investigations to be 6,000,000 tons and now indicate the possibility of 10,000,000 tons.

Central Sweden's ore is of low, medium, and high phosphorous content, varying from below 0.010 percent to 2 percent. Phosphorous-free ores, which form the basis of Swedish high-quality steel production, are the most valuable; ores with high phosphorous content are valuable for the production of coke-reduced pig iron and Thomas phosphate, and the ores with medium phosphorous content are of comparatively less value.

Mines owned by foreign interests account for 25 percent of the ore extracted although they cover only 9 percent of the ore area. Foreign-owned mines are exploited ruthlessly, and some of the best manganese ores are produced by these mines.

While true manganese ores are those in which the manganese content is at least 30 percent of the total, part of Sweden's manganese requirements are filled by iron ore containing from 1 to 10 percent or perhaps 15 percent manganese. The manganese-supply situation is reported to be serious in Sweden, necessitating the exercise of strict economy in its use. It is possible, however, that the increased production of manganese-bearing iron ores, which began before the war, has continued since 1939.

Ore production in central Sweden in normal years is reported at 4,000,000 tons annually, with exports during each of the past 5 years in excess of 3,000,000 tons.

The article points out that on the basis of a depth of 500 meters for the ore deposits of central Sweden, there remain 300 meters to be exploited, which at the present rate would mean exhaustion in approximately 50 or 60 years.

Leather and Related Products

Leather and Manufactures

Boot Repairing, Canada

A boot-repairing plant for the Canadian Army serviced more than 826,000 pairs of boots and shoes during 1943, states a London trade journal. It is also reported that a boot-rebuilding plant has been put into operation. Uppers from condemned boots are utilized, and the plant is capable of producing 1,500 pairs a week.

Shoe Production in Estonia

The municipal administration of Tartu, Estonia, has been making great efforts to supply local residents with footwear, say German-controlled press reports. Present monthly production of the four Tartu shoe factories is estimated at 5,000 pairs of wooden shoes, but it is hoped that this can be increased to a maximum of between 8,000 and 10,000 pairs.

Uruguayan Leather Situation

Activity in Uruguayan tanneries was reported in February to have slowed down temporarily, but orders for leather from principal shoe manufacturers were

Wartime
Shortcuts and Savings will
Pay Profits After the Victory

expected during March. An abundance of heavy leather, particularly coarse sole leather, is reported, but a scarcity of fine leathers, box calf, and kidskin has been felt as a result of recent Government cattle-protection measures and a heavy export demand.

Tanning Materials

Canary Islands Quebracho Imports

Quebracho imported into the Canary Islands during 1943 totaled 174 metric tons.

Corsican Tan Bark Allocated to French Morocco

The Comité Française de Liberation Nationale decided recently to allocate a part of Corsica's tan-bark production to the French Moroccan leather industry, which has been laboring under a severe lack of tanning materials for some time.

Lumber and Products

Output in Manitoba, Canada

The value of forest products in Manitoba, Canada, has increased $5,000,000 during the past 10 years, a Canadian lumber journal reports. Total output has climbed from $1,900,000 in 1933 to $6,900,000 in 1943.

Hardwood Production, Ecuador

In addition to balsa-wood sawmills, Ecuador has a number of plants which handle hardwoods for domestic needs. These mills were unusually active in 1943 inasmuch as some of the mills that were previously engaged in sawing hardwoods are now giving their entire attention to balsa.

Production Decline in Eire

Decreased output value reflects the substantial decline in production of Eire's lumber industry, according to the annual report of the Federation of Irish Manufacturers, Ltd., Dublin.

The value of the timber output for the third quarter of 1943 declined to 39.2 percent (1936=100).

Nicaraguan Exports

The first shipment of balsa from Nicaragua's east coast is expected to be made soon.

Some mahogany was shipped to the United States in 1943 and a smaller amount to Peru. Pine was exported in substantial quantities, while exports of other woods were much smaller.

Machinery, Other Than Electrical

Diesel Engines To Be Manufactured in Canada

An engineering company of New Westminster, British Columbia, Canada, will undertake the manufacture of Diesel engines, according to a Canadian trade journal. The first engines are to be 6-cylinder 200-horsepower marine Diesels of the Atlas Imperial design.

Canadian Imports

Farm machinery imported by Canada in the month of January was valued at $2,629,000, an increase of more than $1,553,000 compared with January 1943, according to the Dominion press.

Canada imported $7,596,000 worth of machinery (excluding agricultural) during January 1944. This was a substantial increase over the corresponding month in 1943, when the total was only $4,827,000, states a Dominion trade publication.

Machinery Repair, U. S. S. R.

In preparation for the spring sowing season, numerous machine-tractor stations were established in the Soviet Union for the repair of machinery. In the fourth quarter of 1943, 14,313 more tractors were repaired than in the corresponding period of 1942.

Medicinals and Crude Drugs

Canadian Imports

Imports of drugs and pharmaceuticals into Canada during January 1944 were valued at $763,000 in contrast with a valuation of only $346,000 during January 1943, the Dominion press states. This figure represents an increase of more than 91 percent.

French Moroccan Fenugreek Exports

French Moroccan fenugreek is sold to almost all European countries, the United States, and Australia, but for years the amount of exports has varied. In 1938 exports totaled 1,106 metric tons, valued at 1,332,482 francs.

Casablanca is the port through which shipments of fenugreek usually are made, but the ports of Mazagan, Safi, and Port Lyautey are also sometimes used.

Pharmaceutical Manufacture, Venezuela

Manufacture of pharmaceuticals has increased greatly in Venezuela, 23 factories in the Federal District now being engaged in that work.

There are 45 factories now making soap and perfumes. A substantial business is being done in manufacturing inexpensive soap for domestic consumption.

Nonferrous Metals

Tin Mine Opened in the Belgian Congo

Opening of a new tin mine at Kasese in the Maniema district of the Belgian Congo is reported in the foreign press. This is said to be one of the chief tin-producing centers of the Colony.

Preliminary to the extraction of the ore it was necessary to construct more than 30 miles of roads and to cultivate nearly 4,500 acres of land to provide food for the workers. The number of workers employed on the roads and in the mines is to be increased soon from 2,000 to 4,500, according to the report.

Chilean Gold Production

Gold production in Chile rose to 444.9 kilograms in December 1943 from the 399.8 kilograms reported in November.

Gold and Silver Exports From Honduras

Exports of gold and silver from Honduras in January 1944 had a value of $263,813 compared with $144,538 in December 1943. The January total was the highest since October 1943.

Portuguese Production

Production of tungsten-ore concentrates containing 60 percent WO_3 in Portugal in the first 9 months of 1943 is estimated at 2,411 metric tons, according to a statistical report of the League of Nations.

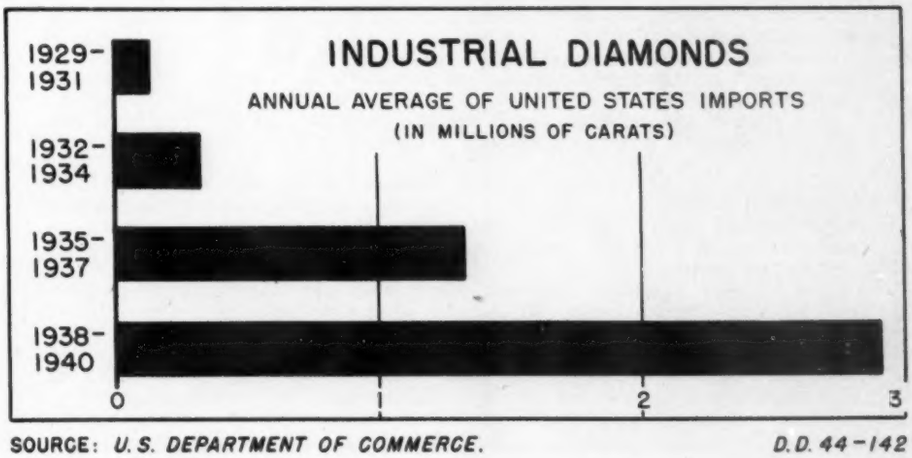
Production in Spain

In the first 7 months of 1943, Spain produced 24,300 metric tons of lead and an estimated 1,376 metric tons of tungsten-ore concentrates containing 60 percent WO_3, according to a statistical report of the League of Nations. Zinc production in the first 8 months of the year totaled 10,700 metric tons.

Oils and Oilseeds

Argentine Sunflower—Seed Crop

The area sown to sunflower seed in Argentina for the 1943–44 crop is estimated at 3,304,860 acres, an increase of 98.5 percent over last year's area of



1,664,780. The increased acreage is probably the result of the Government's offering a high, fixed price for sunflower seed, the foreign press reports. Condition of the crop is said to be good.

Production of vegetable oil is expected to rise sharply in 1944, following a steady increase for the past 10 years, except in 1942–43 when the sunflower-seed crop was affected by drought.

Cottonseed Utilization, Sao Paulo, Brazil

Approximately one-fifth of the cottonseed meal and cake produced in the State of Sao Paulo, Brazil, in 1942–43 was used for fuel and at least half for fertilizer. It was reported in February that sizable quantities of seed were still at gins awaiting shipment to oil mills.

According to an unofficial announcement in Brazil, 903,000 sacks of 30 kilograms each were distributed during the planting season this year in Sao Paulo.

Oilseed Cultivation Encouraged in Bulgaria

Because of the great need of vegetable oils, Bulgaria is trying to promote increased production of sunflower, colza, sesame, and poppy seeds, peanuts, flaxseed, and olives, according to the Nazi-controlled Bulgarian press. A premium is being given for the collection of grape seeds, tobacco seed, and fruit and melon seeds. All organizations and establishments which produce oil are to assist in the gathering of oil-bearing seeds.

To encourage the planting of castor-beans, the Council of Ministers of Bulgaria is facilitating the purchase of seeds by farmers, says the Nazi press. The price of unhusked castor-bean seed for planting has been fixed, and orders for such seeds are to be placed with local branches of the Bulgarian Agricultural and Cooperative Bank.

Canadian Oilseed Production

Yields of sunflower seed have not come up to estimates in the Prairie Provinces of Canada. Seed sufficient for 29,000 acres was distributed last year, and it is believed that this acreage was planted, largely in Saskatchewan and Manitoba. Average production in Manitoba was originally reported to be 700 pounds per acre, but a subsequent estimate of 650 pounds was announced. According to an actual survey of 64 farms in Saskatchewan, however, the yield was 425 pounds per acre. Alberta, where production was small, produced 200 pounds per acre. On this basis, total production for the three provinces would be 17,900,000 pounds, but in view of the fact that by late in February only 4,107,690 pounds had been marketed, it is believed that the revised estimates were too high.

Revised estimates of rapeseed production on 3,200 acres in Manitoba and Saskatchewan indicated a yield of 2,228,000 pounds. Market indications early in February, however, were that production had fallen below these figures.

Ecuadoran Production

Surplus castor-beans produced in Ecuador in 1943 were used by the soap industry. Although production decreased 7.27 percent in 1943, the crop was said to be superior in quality to the 1942 crop. Exports of castor-beans outside the continent declined sharply, while those to neighboring countries in South America increased.

The 1943 crop of palma-real nuts in Ecuador was a poor one, with a small surplus for export to neighboring countries. Nearly the entire production of kernels was absorbed by the soap industry.

New Plant in Ecuador Speeds Balsa-Wood Exports

A large plant with modern equipment for drying and conditioning balsa wood, used in the construction of mosquito bombers and life rafts and preservers, has been erected at Guayaquil, Ecuador, in the fast time of 8 weeks, says a statement by the Office of the Coordinator of Inter-American Affairs. The plan has a capacity of 8,000,000 square feet a year.

A group of 200 Ecuadoran workmen, under the direction of Eugene C. Reichard of the United States Foreign Economic Administration and an Ecuadoran engineer, Alejandro Rendon, rushed work on the plant as the need for improved drying and conditioning facilities became urgent with the rise of balsa-wood production.

Although no figures are available (for security reasons) the United States Department of Commerce reports that Ecuador's balsa exports in 1943 substantially increased.

The drying and conditioning plant was built for the Foreign Economic Administration on two blocks of land in Cerro Santa Ana, on the west bank of the Guayas River.

Since exposure brings deterioration, balsa logs are cut only a few weeks in advance of milling or of shipping. The logs are floated down the river as rafts carrying other goods for sale at Guayaquil and then are cut into boards and planks and dried and graded. Thorough drying is necessary before the logs can be shipped.

The Foreign Economic Administration also has introduced an orderly system of grading the lumber so that the wood now can be loaded on ships at Guayaquil, without delays caused by sortings.

The grading is important because balsa destined for aircraft production must pass more stringent inspection than wood going into lifesaving equipment.

French Moroccan Olive-Oil Production

French Moroccan olive-oil production from the 1943–44 crop is expected to be about 7,000 metric tons, or 50 percent less than output from the 1942–43 crop. French Morocco has produced as much as 20,000 tons annually.

Situation in India

With oversea markets nearly closed as a result of wartime pressure on shipping, India is developing new uses of vegetable oils and oilseeds in an effort to profitably utilize surpluses of these commodities, according to the foreign press. The oils have been used as fuel and (admixed with mineral oil and suitable antioxidants) as lubricating oil.

An attempt has been made to use part of the neem-seed cake instead of pyridines as an alcohol denaturant. Original experiments at Calcutta have been followed by more extensive developments at Benares.

Dehydrated castor oil is already being used widely in India, it is claimed, and applications of castor-oil gels and blown oils have been developed in the paint and lubricating-oil industries.

Progress is being made in the manufacture of plastic materials from coffee beans, oilseed cakes, begasse, jute waste, and horn waste.

The first estimate of acreage sown to rapeseed and mustard seed in India for the 1943–44 season is 3,038,000 acres, a decrease of 12 percent compared with the corresponding estimate of 3,443,000 acres in the preceding year.

The area sown to linseed is estimated at 2,370,000 acres (excluding the mixed crop of the United Provinces) as compared with 2,590,000 acres for the preceding year, or a decrease of 8 percent.

The total area sown to sesame in India for the 1943–44 is 4,167,000 acres, according to the final estimates of all but one important producing province. The area sown last year was 4,328,000 acres.

Yield for the current harvest is expected to be 441,000 long tons, or a decrease of 4.7 percent from last year's output of 463,000 tons.

Nicaraguan Sesame Production

Sesame-seed threshing was completed in January in Nicaragua, and production was between 7,000,000 and 7,500,000 pounds more than local needs demand.

Tung Production, Northern Rhodesia

While several species of tung will grow in certain areas in Northern Rhodesia, cultivation of the most valuable kind, *Aleurites fordii*, has not been successful, according to the South African press. Climatic conditions in Northern Rhodesia are not ideal for tung production, it is believed.

Paraguayan Peanut Crop

Paraguay's first peanut crop of the 1943–44 season, which is harvested between December and February, is said to have been good, and 2,800 tons of peanuts already have been delivered to oil mills. Because of the lack of sufficient rainfall, second plantings were incomplete, and estimated production of peanuts from the second crop is approximately 1,000 tons.

Although the total of the two crops compares favorably with the preceding year's crop, it is not enough to make Paraguay self-sufficient in vegetable oils in 1944.

Peruvian Oil Production

Peru produced small quantities of olive oil and between 500 and 700 tons of castor oil in 1943. Linseed oil was produced on an experimental basis near Lima.

Turkey to Supply Hungary With Sunflower Seed

Turkey is to supply Hungary with 1,000 metric tons sunflower seed, according to a recent agreement, in exchange for 30 metric tons of paraffin wax, the foreign press reports.

Refinery Inaugurated, U. S. S. R.

A vegetable-oil refinery with a daily capacity of 2 tons of oil has been put into operation in Uralsk, Western Kazakhstan oblast, Kazakhstan, in the Soviet Union, according to the Soviet press.

Uruguayan Sunflower Area

The Government of Uruguay has estimated that 51,661 hectares have been sown in sunflower seed for the 1944 crop. Area for the 1943 crop was 27,733 hectares.

Paints and Varnishes

Developments in Sweden

The Swedish paint and varnish industry has had to alter certain processes because of the shortage of linseed oil. One of these changes has resulted in the introduction of emulsion paints, which contain only 4 percent linseed oil, and employ water as the principal solvent.

Extensive use of "barn red" has caused some difficulties, since in Sweden it is customarily made with rye-flour gruel, and flour at present can be allotted to the industry only in very limited quantities. No substitute has been found, but it is hoped that the problem can be overcome as new chemical products are developed.

Resins and solvents suitable for paints and varnishes have been produced by other branches of the chemical industry.

Paper and Related Products

Projected Mill, Monterey, Mexico

A new mill for the manufacture of kraft paper and toweling is to be built at Monterey, Mexico, according to a foreign trade publication. Machinery for the new mill, which will be the first one in northern Mexico, has already been purchased.

Norwegian Paper Industry

The Norwegian paper industry has been in a critical position for some time, state German-controlled press reports.

A ban on the production of approximately 150 items, including albums, book covers, and bookmarks, made effective in May 1943, failed to relieve the situation, and in June it was reported that newsprint distribution to Norwegian papers was restricted to 25 percent of normal consumption. As a result, many rural papers had to limit their editions to two pages and some were obliged to discontinue daily publication. Forced suspension of publication of the Norwegian paper mills' trade journal, because of the paper shortage, strikes a somewhat ironical note.

Old newspapers are now being used as envelopes, it is reported.

Cardboard Factory Inaugurated in Venezuela

A cardboard factory with an estimated annual capacity of 20,000 tons was expected to start operations in Venezuela during March 1944. This plant, a subsidiary of a well-known Caracas firm manufacturing finished paper products, occupies some 30,000 square meters in the town of Petare, about 20 kilometers from Caracas.

It is reported that production will be limited to approximately 5,000 tons annually in keeping with presently estimated domestic consumption. Locally collected waste paper, plus "gamelote," a kind of native grass, will compose 75 percent of the raw materials used and 25 percent will be of imported sulfate pulp.

Petroleum and Products

Bulgarian Shale Deposits

Shale deposits rich in petroleum exist in the mountains of Prin, Bulgaria, according to the foreign press. Machinery for production was scheduled to arrive in Bulgaria by January 1944.

Gasoline for Busses and Trucks Banned in Denmark

Delivery of gasoline for busses and trucks in Denmark was banned unconditionally as of January 1, 1944, according to the foreign press. Since October 1943 no gasoline has been allowed for use in taxis and for a long time there has not been any for use in private cars. Denmark's total requirements are very small.

Ecuadoran Petroleum Industry

Year-end reports from Ecuador indicate that the future of the petroleum industry is bright, although the country's position is not yet one of importance among petroleum producers of the world. Concessions formerly belonging to the Japanese and Germans have been sold by the Government, most of them to a Canadian company. A Netherlands company holding extensive concessions in Ecuador is said to have worked, explored, and mapped the area during the year. While subsidiaries of United States companies are interested in Ecuadorian petroleum, actual production was largely in the hands of British companies.

Exports of petroleum in 1943 from Ecuador to other South American countries totaled 216,229 metric tons (approximately 1,564,246 barrels of 42 United States gallons), valued at 23,795,685 sucres ($1,687,637 in United States currency).

Petroleum Activities in Peru

The Peruvian Government during 1943 made aerial surveys of four unexplored petroliferous areas that are considered promising. It operated two drill rigs in the Pirin field near Lake Titicaca, the results of which are said to be poor to date. The Lake Titicaca zone, extending

Post-War Plans of Sweden's "SKF"

Sweden's internationally known ball-bearing company, A/B Svenska Kullagen Fabriken (SKF), anticipates an accumulated demand for bearings in the post-war era, and is planning accordingly. Three of the four plants operating in Sweden are engaged in the production of raw materials or semifinished manufacturers for branch factories in foreign countries. The company operates three plants in Germany, one in England, two in France, and two in the United States.

All types of bearings will be needed to restock the company's foreign supply after the war, especially bearings for automobiles, agricultural implements, and industrial machinery. There probably will be an extensive demand for railroad bearings, since shortly before the war the company introduced in several countries a cheaper bearing box manufactured especially for railroad freight cars. Distribution since then has been impossible.

A new SKF factory with a capacity of 300 revolver lathes annually was completed in 1943 at Midsommarkransen. Provision has been made to enable the factory to manufacture four times that quantity if necessary.

Additional facilities have been added to the SKF steel mills at Hofors, and a new factory building is scheduled to be completed at the Göteborg plant in the Spring of the present year.

from Puno to the Ramis River, consists of an anticlinal structure interrupted by folds and faults in formations of schists, sandstone, limestone, and conglomerate, the faults permitting the escape of petroleum, gas, and water to the surface. After producing about 284,000 barrels between 1906 and 1915, the Pirin wells were abandoned because of large water flow.

The most important petroleum activities in Peru are concentrated on the northwest coast in the Department of Tumbes, where fields are being worked by two private companies and the Peruvian Government. Individual figures for production in these fields are not yet available, but they will probably represent 60 percent of Peru's total yearly production. The only other important field is at Agua Caliente, of special interest because of its location in the Amazon Valley. Seven wells have been drilled there since 1937, and a small batch-type refinery with a capacity of 380 barrels daily has been built to replace the homemade skimming plant. Storage and transportation facilities have prevented the development of a market for this oil.

Production in the Agua Caliente field was reported to be 30,500 barrels in the first 5 months of 1943, a small increase over output in the corresponding period of 1942 but considerably above the 1941 figure of 13,750 barrels. The crude is paraffinic with low sulfur content, unfit for production of high octane without blending. Lack of storage has made it necessary to pump both gasoline and Diesel fuel back into the wells. When transportation and storage difficulties have been overcome, it is highly probable that these fields can produce gasoline for the Amazon Valley in Brazil.

While complete figures on petroleum production in the whole of Peru are not available, it is expected that 1943 will show an increase over 1942, when production was 13,628,459 barrels. During the first 9 months of 1943, Peru's production was 10,965,537 barrels, an increase of about 9 percent over the corresponding period of 1942. Natural gasoline for the same period was 786,647 barrels, an increase of 5 percent.

Because of the strategic location of the Peruvian fields, they have been extremely important in the petroleum program of the United Nations. Output for 1944 is expected to be at about the level of the 2 preceding years. Indications are that there will be increased demand for Peru's oil after the war.

Oil Deposits, U. S. S. R.

Rich oil deposits have been located in the Shugarov raion (county) of the Tatar Republic, according to a statement of the deputy from the Tatar Republic at the tenth session of the supreme Soviet. It is believed that this raion could yield from 10,000 to 20,000 tons daily (1 metric ton=7.29 barrels).

In 1913, Tsarist Russia is said to have produced a total of 9,200,000 tons of petroleum. Prior to the German invasion of Russia in 1941, the Soviet Union was producing about four times that much, claims the Soviet press.

The new petroleum field in Bashkir, autonomous Soviet republic, is rapidly gaining in importance, the Soviet press claims. Three wells recently drilled are said to be yielding hundreds of tons of crude oil daily. Five wells were scheduled to have gone into operation by March 1, 1944.

Petroleum production in the Kirghiz Republic in 1943 was said to be double that of 1942.

A new oil refinery has been constructed in Ust Ukhta (Chichibu) in the Soviet Union, center of the extensive Petchora coal region, according to the foreign press. The refinery has an annual capacity of some 5,000,000 metric tons, and is served by the Northern Petchora Railway line, recently opened to traffic between Konosha and Khabarova.

Post-War Refining Industry Proposed in U. K.

Discussions are continuing in Great Britain concerning post-war development of a petroleum-refining industry to supply the chemical industry with many of its materials at an economical price, the British press reports.

Rubber and Products

Australian Developments

In an effort to alleviate the rubber shortage, Australia is increasing production of guayule and cryptostegia, says the British press. The guayule plant cultivated in Australia is claimed to have 20 percent rubber content. Experimental cultivation of cryptostegia is being made on 3,000 acres of land.

Synthetic Production, Canada

The Canadian press reports that all the units of the synthetic rubber plant had gone into operation at Sarnia, Ontario, as of February 1944, with an estimated capacity of 34,000 long tons Buna-S synthetic rubber and 4,000 long tons Butyl synthetic rubber. The plant, which cost $48,000,000, includes units for the production of butadiene and styrene for the Buna S and isobutylene for the Butyl synthetic rubbers. It represents one of the most complete plants of its kind in either Canada or the United States. Construction was started in August 1942. In September 1943, 50 percent of the Buna-S units were in production by importing butadiene from the United States.

Rubber-Products Output, New Zealand

According to the Department of Industries and Commerce of New Zealand, the war has given rise to the manufacture of many articles formerly imported. Among these are pencil erasers, rubber sealing compounds, rubber solution, rubber ware for milking machines, and raincoats.

Peruvian Tire Output

Peru's new tire factory is understood to have an annual capacity of some 27,000 tires and an equivalent number of tubes, and facilities for recapping 10,000 tires. Capacity output is not expected to be attained in 1944.

The main building is a reinforced-concrete structure covering 100 by 32 meters, built in two sections with an adjoining powerhouse, and the property is so constructed as to admit easily of expansion when needed. While raw Peruvian rubber is now being used in the factory, other kinds of rubber are being considered. The principal item manufactured is truck tires, although some passenger-car tires are being produced.

Shipbuilding

Danish Ship Construction

Ship construction at Danish yards has not kept pace with war losses, but a few small vessels have been built and some old ones have been brought from abroad and modernized, states the foreign press. A number of the wartime vessels are auxiliary sailing vessels.

A new shipbuilding company, the Skandinavish Industrie-Compagni, is now constructing wooden North Sea fishing cutters of 40 to 50 tons. When materials are available, the yard will shift

to the construction of welded steel ships of up to 500 tons, states the foreign press.

ACTIVITIES IN SWEDEN

The shelter-deck type steamer *Ulla*, with raked stem and cruiser stern, 298 feet long, 44 feet 3 inches wide, and 18 feet 8 inches deep to main deck, was launched by the Lindholmens Varv. yard in Goteborg, Sweden, on January 5, 1944, the foreign press reports. With mean draught of 18 feet 6 inches on summer freeboard, the corresponding deadweight is about 3,050 tons. The vessel is propelled by a triple-expansion engine of Lindholmen construction, combined with a turbo compressor. Steam is supplied by two all-welded cylindrical boilers fitted with forced draught, air preheating, and superheaters.

Fishing vessels recently delivered by yards on the west coast of Sweden include the *Svalan*, 70 feet long; the *Remnaren*, 67 feet; the *Hjalmaren*, 64 feet; the *Timor*, 70 feet; the *Anna Greta*, 70 feet; and the *Ziva*, 68 feet long. All are equipped with Skandia motors of 180 horsepower, except the *Hjalmaren*, which has a 130 horsepower motor.

The demagnetization of Swedish vessels at Stockholm station, where vessels are protected at Government expense against magnetic mines, is to be continued in 1944–45, with 120,000 crowns provided in the budget for this purpose. A new demagnetization station at Goteborg is expected to be ready for use early next summer.

Soaps and Toiletries

PRODUCTION, BOMBAY, INDIA

Bombay, India, has six fairly large soap factories, which manufacture both toilet and laundry soaps. Some of them produce additional toilet preparations, such as scented oils, pomades, and face powders. These factories employ 1,231 workers. At present, difficulties in importing chemicals and high import duties are hindering growth in this industry.

There are 24 factories, employing 2,568 workers, engaged in producing hair oils, perfumes, and table oils.

Special Products

BRUSH IMPORTS INTO JAMAICA, B. W. I.

Imports of brushes into Jamaica, British West Indies, declined somewhat in 1942 compared with the preceding year, according to figures published recently in a foreign trade journal.

The following table shows quantities and values of imports in 1941 and 1942:

Kind of brush	1941		1942	
	Number	Value	Number	Value
Household	43,603	£2,709	40,043	£2,493
Toilet	214,913	6,855	190,512	6,817
Artisans'	29,517	1,816	24,726	1,145
Others	18,647	1,468	12,489	1,397

CANADIAN BRUSH MANUFACTURERS UTILIZING HORSEHAIR

Brush manufacturers in Canada have found that satisfactory paint brushes can be made from "flagged" horsehair, a Dominion trade journal reports. A wheel having sharp teeth is used to split the ends of the horsehair into several sections, thus making a flag similar to that of natural hog bristles. It is claimed that brushes made from this horsehair spread paint effectively. The flag is especially valuable during the "breaking-in" period, when an unflagged horsehair brush is difficult to use.

The Canadian horsehair-dressing industry has increased its output greatly, and now produces approximately 400,000 pounds annually.

Textiles and Related Products

MILLS ACTIVE IN BARRANQUILLA, COLOMBIA

Cotton and rayon mills in Barranquilla, Colombia, continued busy throughout February. One plant has expanded its facilities and anticipated an increased output of cotton yarn in March. A small rayon-weaving room will be placed in operation shortly.

Cotton and Products

ANGOLA'S CROP

A record cotton crop of 12,234,263 kilograms of seed cotton was reported for 1943 by the largest cotton-growing company in Angola. This company, which produces more than half the total crop of the country, reported 9,090,198 kilograms in 1942 and 11,213,336 kilograms in 1941, according to an African publication.

BULGARIAN INDUSTRY HANDICAPPED

Cessation of imports and an unsatisfactory cotton crop have seriously affected the textile industry of Bulgaria, the German-controlled press reports.

Substitute materials were formerly imported from Italy, but these are no longer available.

COTTON SHORTAGE, TIENTSIN, CHINA

Despite Japan's strenuous efforts to obtain cotton, reports indicate that spinning and weaving mills in the Tientsin area of China have been forced to close because raw cotton is unavailable.

SPANISH COTTON CROP

Spain's 1943 cotton crop is now reported as 4,496,000 kilograms of ginned cotton, or about 20,400 bales.

Up to January 10, 2,813 bales had been disposed of.

Basic prices for raw cotton of the 1944 crop were established by the Ministry of Agriculture. A premium was granted on all raw cotton cultivated in unirrigated soil during 1943.

Synthetic Fibers

SPUN STAPLE-FIBER PRODUCTION IN FINLAND

During the latter half of 1943, a plant in Finland began production of spun staple fiber. Supply of this raw material to textile manufacturers permitted them to partially alleviate the extreme scarcity of children's hosiery and underwear.

Wool and Products

ARGENTINE WOOL INDUSTRY

Despite little export business during January, demands of the domestic woolen industry and scouring plants, kept the Argentine wool market on a firm basis.

Concerning a Certain "Lack of Lac"

Music lovers learned that phonograph records required *lac bugs*, after the Japanese invaded Burma and gained control of the chief habitat of the billions of insects primarily instrumental in making shellac. During the past 2 years it has been possible to provide the U. S. Army and Navy with shellac only by domestic curtailment of unessential civilian uses. Substitutes have been sought, and various synthetic resins do serve as substitutes in some uses, but the upply is not adequate for all demands. Moreover, shellac imports from India are less than the pre-war shipments. Consequently, the search for satisfactory bug and other substitutes continues.

A sample of "Nige," a resin produced by an insect in Guatemala, in a manner similar to the exudation of lac by the famous "lac bug" in India, was tested in this country, but its properties indicated that it would make a poor substitute for shellac in paints and varnishes. Information has been received from Brazil concerning the production of a lacquer from a pine-knot gum which is reported satisfactory for use on the cheaper varieties of woodwork, as a waterproofing ingredient for textiles and paper, and for insulation of land cables. This substitute resin was reported unsuitable for use in finer grades of paints and varnishes, for making phonograph records, and as a cementing agent for electric lamps. Two other resins, "Goma de Cereja" and "Resina de Jotoba," are also used in Brazil in varnishes and for manufacturing wool hats.

However, this Government is apparently assured of the ability to meet adequate military needs for protective coatings and water-proofing agents for various ordnance items, judging from the recent change of shellac from Group I to Group II on WPB's Material Substitutions and Supply List.

Exports totaled 26,535 bales in January, compared with 20,232 bales in the preceding month and 18,969 bales in January 1943. This makes a total of 87,817 bales (or 47,123 metric tons on a grease-wool basis) shipped in the period from October 1, 1943, to January 31, 1944. Shipments in the corresponding months of 1942-43 aggregated 56,055 bales (28,075 tons grease-wool basis).

Commercial stocks on January 1, 1944, were equivalent to 140,840 tons on a grease-wool basis.

Wool Control, U. K.

Allotments in the United Kingdom for March wool sorting by topmakers were practically the same as for January and February. Hosiery-type yarns comprised most of the early March business. Provisional orders were placed for weaving yarns, subject to confirmation after receipt of ration certificates. Cloth production consists primarily of utility fabrics for designated clothing factories.

Firms having wool cloth, utility or nonutility, which has not sold readily in the home trade, may offer it to the Ministry of Supply for relief reserves. Coupons will be given for stocks purchased, but raw materials will not be replaced.

Applications will be considered by the Wool Control for additional nonutility rations of waste, shoddy, and bale or waste cotton, according to a late February announcement. This step was taken to enable woolen mills to maintain their present rate of employment despite a reduction in government contracts. If part-time work were instituted, employees would still be allotted full-time wages, under the Essential Work Order, and this would make the unit cost excessive.

Miscellaneous Fibers

Flax Experimentation, Canada

A pilot plant for retting and scutching fiber flax is being established at Portage la Prairie, Manitoba, Canada, by the Dominion Government. A test plot of 100 or more acres will be grown.

Experiments in fiber-flax cultivation are also being conducted by a grain company at several of its elevator sites in the northern agricultural region of the Prairie Provinces. Preliminary reports are encouraging.

Tobacco and Related Products

Tobacco Acreage, Ontario, Canada

In 1944, for the second year in succession and the second time in the history of the industry, the Ontario Flue-cured Tobacco Marketing Association is not restricting tobacco acreage in that Province. Greatly increased consumption of tobacco and sadly depleted stocks are believed to be the principal reasons for this action.

The acreage planted to tobacco this year will be left entirely to the discretion of the growers and is expected to reach 70,000 acres of flue-cured tobacco. This acreage normally would supply approximately 80,000,000 pounds of leaf.

At least 80 new farms are being equipped for the growing of tobacco. Membership in the Association has been offered to new growers as well as nonmembers already equipped to grow tobacco on the basis of acreage allotments in 1937. About 50 percent of all growers now belong to the Association.

Cuban Output of Tobacco Products

Officially released figures covering the manufacture of tobacco products in Cuba during the first 6 months of 1943 indicate a greatly increased market for higher-priced items.

Production of cigars selling for more than $25 per 1,000 was increased by 17,954,667 units, totaling some 50,371,326 cigars during the first 6 months of 1943. Output of cigars selling for $25 or less per 1,000 decreased correspondingly, amounting to 101,516,938 cigars as against 118 539,849 in the comparative period of 1942.

Cigarette production also declined, output in the first 6 months of 1943 being 185,401,315 packages of 16 cigarettes while production in the corresponding period of 1942 totaled 185,409,394 packages.

Nyasaland's Tobacco Crop

According to a foreign trade journal, tobacco production in Nyasaland during 1943 remained practically static, amounting to about 25,000,000 pounds, or approximately equivalent to that of 1942. Weather conditions were most unfavorable and the crop, on the whole, was poor in quality. This was especially true of flue-cured tobacco.

Turkey's Crop

Tobacco production in Turkey during 1943 is estimated at approximately 122,700,000 pounds compared with 152,500,000 pounds harvested in 1942, states a foreign trade journal. Average annual production of tobacco leaf for the 4-year period 1938–41 was estimated at 132,200,000 pounds.

Venezuelan Tobacco-Products Industry

Approximately 70 percent of Venezuela's annual production of 4,000 metric tons of tobacco leaf is used in the manufacture of cigarettes and the remainder in the production of cigars and chewing tobacco. The industry has been, on the whole, stable, with few changes in productive capacity since the last industrial census in 1936. At that time there were 275 establishments in Venezuela manufacturing tobacco products, employing about 2,182 persons. In 1941, a new cigarette factory was put into operation, but its output is small and has not greatly affected the over-all capacity of the industry.

A tire-recovery plant at Tel-el-Kebir, Egypt, repairs and retreads tires for the entire Middle East, according to the foreign press. The work, done by native inhabitants, is supervised by the British. Branches of the plant, scattered throughout the area, collect and grade the tires before shipping them to the central plant for retreading.

Contributors' Column

Irven M. Eitreim (co-author "Canadian Farm Sentiment").—Foreign Commerce Weekly regrets that a biographical sketch of Mr. Eitreim is not available at this time.

Edwin W. James ("New Bridges Unite the Americas").—See the October 2, 1943, issue of this magazine.

Eric G. Lagerloef ("Scandinavian Pulp and Paper Industries").—Born in Weehawken, N. J., Mr. Lagerloef attended the Valley Ranch School in Wyoming, the Peddie School at Hightstown, N. J., and Brown University at Providence, R. I. (degree of Ph. B., 1934). He traveled abroad in 1920, 1922, 1931, and 1933; on the latter two trips he traveled extensively in Finland, Sweden, and northern Germany. In June 1934 Mr. Lagerloef went to Finland, where he spent 2½ years working in more than 30 pulp and paper mills. During the summers, while on holidays, he made trips through the Baltic States, East Prussia, and northern Germany. Upon his return from Finland at the end of 1936, he started work with the Lagerloef Trading Co., Inc., in New York City, then sole sales agents for all grades of Finnish woodpulp and groundwood. In May 1940 Mr. Lagerloef started his own business as commission sales agent and manufacturers' representative for corn starch and fourdrinier paper-machine wires, selling to paper mills in New York, New Jersey, and Pennsylvania. In September 1942 he entered the Government service. He joined the Bureau of Foreign and Domestic Commerce in September 1943 and is at present with the Pulp and Paper Unit as Associate Economic Analyst.

Clifford C. Taylor (Co-author "Canadian Farm Sentiment").—This magazine regrets that a biographical sketch of Mr. Taylor is not available at this time.

E. E. Schnellbacher ("Commercial Intelligence Plays Major Wartime Role").—See the June 5, 1943, issue of this magazine.

Canadian Farm Sentiment

(Continued from p. 13)

Other requests were made for improvement in the systems of grading and marketing various farm commodities and in storage and transportation facilities.

Rural health needs, now that so many country doctors are away, led to the Federation's asking that the Government use military hospital units as rural health centers.

Lower taxation was featured only in a request by the Federation that 75 percent of the proceeds of livestock dispersal sales be considered as return of capital and only 25 percent counted for income-tax purposes.

U. S. Export Control and Related Announcements

(Developments communicated to the Trade Controls Unit up to Tuesday, April 4, 1944)

The Requirements and Supply Branch, Bureau of Supplies, Foreign Economic Administration, has issued the following Current Export Bulletins:

No. 523—*Current Export Bulletin No. 154, March 31, 1944*

I. *Identification Symbols on Licenses and Release Certificates Assigned a Preference Rating*

A. In accordance with the direction of the War Production Board, all licenses and release certificates issued by the Foreign Economic Administration bearing a preference rating will include an identification symbol. This is an extension of the existing requirement calling for these symbols on all CMP material allotments.

B. The above documents granted for countries for which the Office of Economic Warfare was claimant agent will be stamped with the letter "E" and all countries for which the Office of Lend-Lease Administration was the claimant agency will be identified by the symbol "L"–1, 2, 3, or 4.

C. When extending the preference rating to the manufacturer, the exporter or supplier shall include the applicable symbol. These symbols are necessary for the maintenance of records required by the War Production Board. They will also assist in the identification of orders for materials and commodities destined for export.

II. *Flour Exportations—Change in General License*

The general license provisions for exportations of wheat flour, wholly of U. S. wheat, Schedule B No. 1073.00, and wheat flour, not wholly of U. S. wheat, Schedule B No. 1074.00, which were to be canceled effective April 1, 1944 (Current Export Bulletin No. 151, March 14, 1944, Subject IV—Announcement 520 in FOREIGN COMMERCE WEEKLY for March 18) are continued in effect until May 1, 1944 for shipments to Group K destinations.

III. *Extension of Release Certificates Issued Under Program License ME–1*

With the exception of release certificates covering shipments of Petroleum and Petroleum products (Schedule B Nos. 5011.03 through 5059.00), all release certificates issued on or after October 1, 1943, covering exportations of commodities to the destinations included in the combined Agency for Middle East Supplies Program License ME–1 (See Comprehensive Export Schedule No. 13, item 10, pages 98–99) will remain valid for one year from date of issuance regardless of date of expiration shown thereon. Release certificates covering Petroleum and Petroleum products will continue valid for the period originally indicated on the certificate.

IV. *Additions to List C Commodities.*

Effective immediately, Coal, Coke, and Coal and Coke briquets are included in the list of products in paragraph 1. c., under Program Licenses Currently in Effect, on page 97 of Comprehensive Export Schedule No. 13. Therefore, release certificate applications covering the export of such commodities to the British Empire and Middle East program destinations will be forwarded by the appropriate certifying agencies to the Foreign Economic Administration for end-use approval before issuance of release certificates.

V. *Suggested Export License Application Limits for Automotive Replacement Parts for the Second Quarter, 1944. Schedule B Nos. 7921, 7923.05, and 7092.*

The Foreign Economic Administration proposes "Export License Application Limits" for the second quarter of 1944 under a procedure similar to that offered to exporters of automotive replacement parts during the first quarter of 1944, as set forth in Section E, page 111, Comprehensive Export Schedule Number 13. These "limits" represent figures beyond which applications for licenses to export automotive replacement parts to the Latin American republics involved may be, but are not likely to be, approved.

Exporters who have filed questionnaire Form 31–4305 (giving 1941 export figures) will be notified of application limits for the second quarter of 1944 based on their 1941 exports, as soon as they are established.

Exporters of automotive parts who have *not* supplied this office with 1941 export figures should show, when submitting individual applications in the second quarter of 1944, their past export sales for 1941 for this commodity to the country of destination, so that their application limits may be ascertained.

The suggested limits are offered to exporters as a guide in planning their work, and do not represent commitments from the Foreign Economic Administration.

This plan dos not eliminate the necessity for an Import Recommendation, and similar documents when required under the Decentralization Plan.

VI. *Validity of Priority Ratings.*

In certain cases, exporters are returning licenses or release certificates to be revalidated because the wording of the present preference stamp (" . . . This material is to be charged to the period from ---------- to ----------.") suggests that the priority rating assigned expires at the end of the period. This is not the case. Priority ratings issued by the Foreign Economic Administration under delegation of authority from the War Production Board are valid for extension to the supplier until used for the exportation.

The reference in the stamp to the charge period is included for War Production Board accounting and does *not* indicate expiration of the rating.

VII. *Applications for Licenses to Export to Switzerland—Correction of Address.*

Comprehensive Export Schedule No. 13, page 100, item 3, paragraph *b* (iii) is amended as follows:

Switzerland—Swiss Cargo Commissioner, 44 Madison Avenue, New York 22, New York.

It will aid in the processing of applications for licenses to export to Switzerland if they are submitted through the Swiss Cargo Commissioner.

VIII. *Changes in General Licenses*

Commodity	Dept. of Commerce schedule B number	General license group old	General license group new	Effective date of change
Leather:				
Case, bag and strap leather	0356.00	K	None	Apr. 6, 1944
Glove, and garment leather, other	0339.00	K	None	Do.
Other upper leathers	0311.00	62	None	Do.
Pig and hog glove and garment leather	0338.00	K	None	Do.
Sheep and lamb glove and garment leather (except shearling)	0336.00	K	None	Do.
Machinery—Vehicles—Automotive, Parts and Accessories:				
Automobile parts for assembly abroad into complete vehicles with American trade names	7912.00	62	None	Do.
Engines, Diesel and semi-Diesel, for replacement	7931.30	62	None	Do.
Engines, gasoline (carburetor type) for replacement	7931.50	62	None	Do.
Horns, hand and electric	7926.00	62	None	Do.
Motor truck and bus engines, Diesel and semi-Diesel, for assembly	7928.30	62	None	Do.
Motor truck and bus engines, gasoline (carburetor type) for assembly	7928.50	62	None	Do.
Passenger car engines	7929.00	62	None	Do.
Spark plugs	7921.00	62	None	Do.
Other automobile accessories, n. e. s. (include air cleaners, oil rectifiers, taxi-meters and other automobile engine accessories)	7927.00	62	None	Do.
Other automobile service appliances and parts	7931.80	62	None	Do.
Machinery—Vehicles—Miscellaneous:				
Air brake equipment and parts for railroad cars	7968.00	62	None	Do.
Internal-combustion Marine engines (carburetor type) other than detachable motors	7959.00	62	None	Do.
Motorcycles	7952.00	62	None	Do.
Motorcycle parts and accessories (report tires and inner tubes in 2064.00)	7954.00	62	None	Do.

The leathers listed above are now under allocation and for that reason it is necessary to remove them from general license to Group K destinations.

The automotive parts and accessories listed are included wholly or in part under Limitation Order L–158 of the Automotive Division, WPB. Specific quotations for items included in L–158 are set up for the exports to all areas for the year 1944. Therefore, it is necessary to remove the commodities from general license at once.

Shipments of the above commodities, which were on dock, on lighter, laden aboard the exporting carrier, or in transit to ports of exit pursuant to actual orders for export prior to the effective date of change may be exported under the previous general license provisions. Shipments moving to a vessel subsequent to the effective date of change pursuant to ODT permits issued prior to such date may also be exported under the previous general license provisions.

No. 524—*Current Export Bulletin No. 155, April 1, 1944*

I. *Modification of Decentralization Procedure for Brazil*

A. Effective April 1, 1944, a further modification of the Decentralization Plan for Brazil is made by removing additional commodities from the Preference Request Recommendation system. As a result, the Decentralization Procedure for Brazil will remain in effect only for those commodities listed in paragraph C below. This modification follows the simplifications in Decentralization procedures announced previously.

B. On and after April 1, 1944, exporters will no longer be required to obtain Preference Request Recommendations to accompany license applications to export to Brazil any commodity which is *not* listed in paragraph C below. However, the Foreign Economic Ad-

ministration will endeavor in so far as possible to give preference to those applications which are accompanied by Preference Request Recommendations already issued. Exporters should note that while the commodities that are not contained in paragraph C below, will no longer require Preference Request Recommendations, they will continue to be subject to quantity and other limitations of the WPB or other agencies.

C. Those commodities which have not been removed from the Decentralization Procedure and for which Preference Request Recommendations must accompany all license applications to export to Brazil are set forth in the basic list below:

Commodity	CMP Code No.	Schedule B Number
Chemicals:		
Ammonium sulphate		8505.00
Aniline oil and salts		8025.15, 8025.19
Citric acid		8303.07
Lead arsenate		8202.00
Paris green		8205.91, 8397.02
White arsenic		8309.90, 8398.98
Copper sulfate		8201.00
Cresols		8024.09
Xylenols		8024.09
Cresylic acid		8024.09
Formaldehyde		8320.01, 8320.03, 8320.05
Hexamethylenetetramine		8329.96, 8329.98
Phenol		8023.00
Plastics:		
Alkyd		8253.00
Acrylic		8258.03, 8258.09, 8260.98, 8261.98, 8261.03
Vinyl		8258.09, 8260.98, 8261.98
Potash salts		8531.01, 8531.03, 8531.05
Potassium chlorate		8359.08
Potassium permanganate		8359.23
Potassium chromate and bichromate		8357.00
Sodium chromate and bichromate		8368.00
Sodium phosphates		8377.00
Coal and coke		5001.00 through 5004.00
Steel:		
Steel, carbon and alloy	2001	6020.00
	2005	6021.00, 6022.00, 6023.00
	2011	6032.05, through 6032.98, 6016.01 through 6016.09
	2016	6062.00, 6063.00, 6064.00, 6070.00, 6071.00, 6072.00, 6073.00
	2021	6030.15 through 6031.19
	2026	6051.00, 6062.00, 6054.00, 6058.00, 6059.00
	2031	6033.00 through 6035.10, 6036.00, 6037.11 through 6037.19, 6038.11 through 6038.19
	2036	6104.10
	2041	6045.00, 6050.00
	2051	6060.00, 6061.00, 6077.05
	2056	6105.15 through 6105.38
	2061	6029.00, 6081.00 through 6085.00, 6087.10, 6087.50, 6091.01, 6091.09 through 6091.98, 6092.00, 6093.00, 6095.00
	2505	6025.00, 6026.00, 6209.07
	2511	6017.01 through 6017.09
	2516	6062.00, 6063.00, 6064.00, 6070.00, 6071.00, 6072.00, 6073.00
	2521	6031.50 through 6031.98
	2526	6051.00, 6052.00, 6054.00, 6058.00, 6059.00
	2531	6035.50 through 6035.90, 6037.51 to 6037.98, 6038.51 through 6038.98
	2536	6104.90
	2541	6045.00
	2551	6060.00, 6061.00, 6077.05
	2561	6029.00, 6081.00 through 6085.00, 6087.10, 6087.50, 6091.01, 6091.09 through 6091.98, 6092.00, 6093.00, 6095.00
Fourdrinier wire	824	6086.90
Iron and Iron Products:		
Cast iron pipe and fittings		6066.00 through 6068.98
Cast iron railway car wheels		6105.15
Iron, other castings		6101.00, 6102.00
Malleable iron pipe fittings		6065.00
Pig iron		6007.00
Nonferrous Metals and Miscellaneous Minerals:		
Graphite		5480.55
Copper and copper base alloys	3011	6450.00
	3021	6448.01, 6479.09, 6457.00
	3041	6453.00
	3051	6423.00
	3061	6424.00
	3071	6422.00
	3101	6425.00 through 6435.00
Copper and copper base alloy castings	3201	6479.13
Nickel and nickel alloys		6545.01, 6545.05, 6545.09
Pig tin and tin manufactures		6565.01 through 6565.07, 6565.09
Zinc and manufactures		6571.01 through 6589.98
Rubber and Rubber Products:		
Tires and innertubes and solid tires		2060.00 through 2067.00
Wood and Wood Manufactures:		
Balsa manufactures		4299.00
Battery storage separators, blanks, etc		4299.00
Douglas fir plywood		4299.00
Sawmill products		4060.00 through 4139.00, 4156.00, 4159.00
Wood manufactures		4214.01 through 4228.00, 4260.00, 4291.00, 4292.00
Wood, unmanufactured		4001.00 through 4034.00

II. *Modification of decentralization procedure for Colombia and Venezuela*

A. Effective April 1, 1944, a modification of the Decentralization Plan for *Colombia* and *Venezuela* is made by the removal of additional commodities from the Import Recommendation system. This modification follows simplifications in the Decentralization procedure announced previously.

B. The additional commodities for which license applications to export to Colombia and Venezuela will be considered without accompanying Import Recommendations are set forth below. However, the Foreign Economic Administration will endeavor insofar as possible to honor those applications which are accompanied by Import Recom-

(Continued on p. 41)

Trade Mark Applications

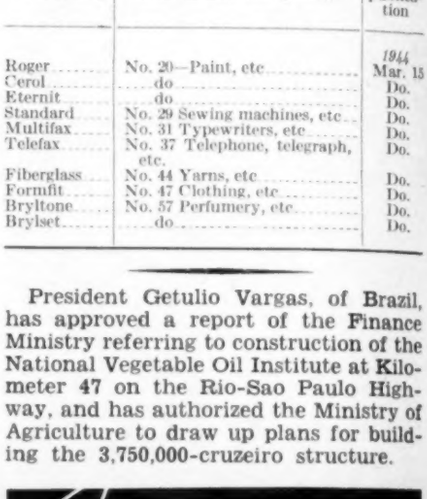
Argentina.—The following applications for trade-mark registration were published in the Boletín Oficial of March 14, 1944. Opposition must be filed before April 10, 1944:

Trade-mark	*Class No. and Commodity*
Precision	No. 18—Entire class.
Mohawk	No. 21—Entire class.

Chile.—The following applications for trade-mark registration were published in the Diario Oficial of Santiago. Opposition must be filed within 30 days from the date of publication.

Trade-mark	Class number and product	Date of publication
		1944
Roger	No. 20—Paint, etc	Mar. 15
Cerol	do	Do.
Eternit	do	Do.
Standard	No. 29 Sewing machines, etc	Do.
Multifax	No. 31 Typewriters, etc	Do.
Telefax	No. 37 Telephone, telegraph, etc.	Do.
Fiberglass	No. 44 Yarns, etc	Do.
Formfit	No. 47 Clothing, etc	Do.
Bryltone	No. 57 Perfumery, etc	Do.
Brylset	do	Do.

President Getulio Vargas, of Brazil, has approved a report of the Finance Ministry referring to construction of the National Vegetable Oil Institute at Kilometer 47 on the Rio-Sao Paulo Highway, and has authorized the Ministry of Agriculture to draw up plans for building the 3,750,000-cruzeiro structure.



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U. S. Export Control and Related Announcements

(Continued from p. 40)

mendations already issued. The exporter should note that while these commodities will no longer require Import Recommendations, they will continue to be subject to quantity and other limitations of the WPB or other agencies.

Commodity description	WPB industry division	CMP code number	Schedule B numbers
Automotive replacement parts and accessories	Auto	105	7092.00, 7923.05, 7926.00, 7927.00
Batteries	Auto	430	7013.00, 7014.00
Spark plugs (except aircraft)	Auto	413	7921.00
Motor vehicle engines	Auto	136	7928.30, 7928.50, 7929.00, 7931.30 7931.50
Ball and roller bearings	Tool	155	7691.00, 7692.00, 7693.00
Asbestos metallic yarn and friction materials	Cork	722	5456.00, 5457.00, 5458.10, 5458.30

In determining whether or not an Import Recommendation is required to accompany license applications to export commodities coming under the above classifications, the exporter and foreign importer should be guided by the CMP Code classification of the commodity.

Import Control

No. 45—*Amendment of General Imports Order M–63 as amended January 8, 1944, Making Specified Changes in Lists I, II, and III, and Deleting the Exemption for Small Shipments Imported by Mail.*

The War Production Board has issued an amendment to General Imports Order M–63, dated March 30, 1944, and effective from that date, making specified changes in Lists I, II and III of the Order, and deleting the exemption heretofore provided in paragraph (b) (4) (iv) of the text of the Order for materials imported by mail where the value of the shipment is less than $100.

Most of the changes in the lists of materials attached to the Order consist of the removal of various products from the Order, import control over which is no longer considered necessary in the war program. No new products are added by the amendment made today, the apparent additions being merely a narrowing of the listed description of some materials heretofore subject to M–63.

The amendment makes the following changes in the lists of materials (Schedule A Commerce Import Class Numbers in parentheses):

Removed from List I—Albarco logs (N. S. C.); albarco lumber (N. S. C.); divi divi pods (2320.140) divi divi, hemlock and chestnut extracts (2345.000); myrobalan fruit and extract (2304.000 and 2345.800); palmyra fiber, unmanufactured (3409.310); palmyra fiber, manufactured in whole or in part, including bassine (3410.030); palmyra stalks (N. S. C.); rubber seed (2239.500); rubber seed oil (N. S. C.); tanning extracts, not specially provided for (including urunday) (2345.900); tara (2320.230); valonia beards and extract (2307.000 and 2345.-100); vermiculite (N. S. C.).

Added to List II—Corundum in grains, or ground, pulverized or refined (N. S. C); pulpwood, except chipped pulpwood (4590.000–4595.000 inclusive).

Removed from List II—Aluminum scrap (6302.300); copper, brass and bronze manufactures; copper, brass or bronze manufactures, not elsewhere specified on this order, which contain 25 percent or more of copper, brass, or bronze, by weight (N. S. C.); copper table, household, kitchen, and hospital utensils, and hollow or flatware n. s. p. f. (6430.090); brass blow torches, and incandescent lamps operated by compressed air and kerosene or gasoline (6458.700); brass table, household, kitchen and hospital utensils, and hollow or flatware, n. s. p. f. (6458.800); corundum and emery in grains, or ground, pulverized or refined (5470.010); magnesium, metallic and scrap (6760.310); nutgalls or gall nuts (2310.000); paper pulp or paper making machines, n. s. p. f., and parts thereof (7800.830); pulpwood (4590.000–4596.000 inclusive); talc, steatite (magnesium silicate), containing not to exceed 1½ percent of lime and 1½ percent ferric oxide, ground, washed, powdered, or pulverized (N. S. C.).

Added to List III.—Congo gum copal (N. S. C.).

Removed from List III.—Annatto and annatto extracts (2320.000); berries, dried, desiccated, or evaporated (1330.210); bottle caps, collapsible tubes, and sprinkler tops of metal, including foil bottle caps (except screw caps and patented closures) (6790.010 and 6790.020); boxwood logs (4033.000); candelilla wax (2252.200); citrons, or citron peel, crude, dried (1326.200); crabs, fresh or frozen, prepared or preserved (0086.400 and 0086.500); grapefruit and pomeloes (1302.000); gums copal (include Kongo, Manila, East India, Animi, Accroides, Yacca) (2109.700); hairpins of base metal, not plated with gold or silver, not jewelry (including bobby pins) (6790.350); hempseed (2238.000); hempseed oil (2260.030); limes (1304.000); lobsters, canned and not canned (0083.000 and 0084.000); melons (1330.420 and 1330.430); monazite sand and other thorium ore (5930.300); orange flower or neroli oil (2280.280); orange oil (including mandarin) (2277.000); orange oil, terpeneless (including mandarin) (2277.100); paprika, ground or unground (1523.100); peppers (1210.050); psyllium seed (plantago psyllium seed, fleawort, fleaseed, and fleaseed husks) (2208.000); salts derived from vegetable oils, animal oils, fish oils, animal fats, and greases, not elsewhere specified, or from fatty acids thereof (2260.260); soap bark or quillaya (2210.820); tonka beans (1546.000); tuna fish fresh, or frozen (0058.000); turtles (0086.200); vanilla beans (1545.000); vegetable ivory or tagua nuts (2911.000).

Moved from List I to List II.—Bristles, hog and pig (0917.000 and 0979.100); brushes, n. s. p. f.: paint brushes (including artists') (9715.100); other (except toilet brushes and hair pencils) (9715.900); horse mane and tail hair, raw and drawn, including switches (3694.000 and 3694.100); mangrove bark (2320.180); mangrove extract (including Philippine cutch) (2342.000); quebracho extract (2344.000); quebracho wood

(2305.000); wattle bark (2309.000); wattle extract (2345.500).

Moved from List I to List III.—Vegetables, dehydrated (N. S. C.).

No. 46—*Amendment to Supplemental General Imports Order M–63–a Removing Specified Materials from Schedule A*

An amendment to Supplemental General Imports Order M–63–a, issued by the War Production Board on March 30, 1944, and effective from that date, removes the following products from Schedule A of that Supplemental Order (Commerce Import Class Numbers in parentheses):

Bottle caps, collapsible tubes, and sprinkler tops of metal, including foil bottle caps (except screw caps and patented closures) (6790.010 and 6790.020); canary seed (2452.000); hairpins of base metal, not plated with gold or silver, not jewelry (including bobby pins) (6790.350).

Price Control

Import Price Control (Circular No. 3)

The Office of Price Administration has issued on March 25, 1944, Order 11 to the Maximum Import Price Regulation, establishing a limited exception relating to sales of imported industrial materials priced prior to issuance of Amendment No. 2 (Max. Import Regulation, as issued February 28, 1944, announced in FOREIGN COMMERCE WEEKLY of March 11). The effect of this Order is to allow a grace period of 60 days from March 2, 1944 for the recalculation of the sales prices of imported industrial materials that may be necessary under the provisions of the Maximum Import Price Regulation. This action for the imported industrial materials parallels the provision that was made earlier for the imported manufactured goods. The text of Order 11 is as follows:

(a) Notwithstanding the provisions of the Maximum Import Price Regulation, any importer, or intermediate distributor, who has applied for or has obtained an approved maximum selling price for imported industrial materials from the Export-Import Price Branch, Office of Price Administration, Washington, D. C., prior to March 2, 1944, under paragraph (c) of section 3 or paragraph (c) of section 4 of the Maximum Import Price Regulation, may sell or deliver such materials at the approved price within 60 days after March 2, 1944.

(b) Notwithstanding the provisions of the Maximum Import Price Regulation, any importer who has properly established a maximum selling price for imported industrial materials under paragraph (a) of section 3 by calculating his permitted total landed costs on the basis of a first purchase of such materials after August 20, 1943, may sell or deliver such materials at that maximum price within 60 days after March 2, 1944.

(c) This Order No. 11 shall become effective March 25, 1944.

Trade Agreement Calendar

Trade Agreements Signed

Country	Date signed	Date effective
Cuba	Aug. 24, 1934	Sept. 3, 1934
Belgium (and Luxemburg)	Feb. 27, 1935	May 1, 1935
Haiti	Mar. 28, 1935	June 3, 1935
Sweden	May 25, 1935	Aug. 5, 1935
Brazil	Feb. 2, 1935	Jan. 1, 1936
Canada (see revised agreement below)	Nov. 15, 1935	Do.
Kingdom of the Netherlands (Netherlands in Europe, Netherlands India, Surinam, and Curacao)	Dec. 20, 1935	Feb. 1, 1936
Switzerland	Jan. 9, 1936	Feb. 15, 1936
Honduras	Dec. 18, 1935	Mar. 2, 1936
Colombia	Sept. 13, 1935	May 20, 1936
Guatemala	Apr. 24, 1936	June 15, 1936
France and its colonies, dependencies, and protectorates other than Morocco	May 6, 1936	Do.
Nicaragua [1]	Mar. 11, 1936	Oct. 1, 1936
Finland	May 18, 1936	Nov. 2, 1936
El Salvador	Feb. 19, 1937	May 31, 1937
Costa Rica	Nov. 28, 1936	Aug. 2, 1937
Czechoslovakia [2]	Mar. 7, 1938	Apr. 16, 1938
Ecuador	Aug. 6, 1938	Oct. 23, 1938
United Kingdom, including Newfoundland and the British Colonial Empire	Nov. 17, 1938	Jan. 1, 1939
Canada (revision of agreement of 1935)	do	Do.
Turkey	Apr. 1, 1939	May 5, 1939
Venezuela	Nov. 6, 1939	Dec. 16, 1939
Cuba (supplementary agreement)	Dec. 18, 1939	Dec. 23, 1939
Canada (supplementary agreement) [3]	Dec. 30, 1939	Jan. 1, 1940
Canada (supplementary agreement)	Dec. 13, 1940	Dec. 20, 1940
Argentina	Oct. 14, 1941	Nov. 15, 1941
Cuba (supplementary agreement)	Dec. 23, 1941	Jan. 5, 1942
Peru	May 7, 1942	July 29, 1942
Uruguay	July 21, 1942	Jan. 1, 1943
Mexico	Dec. 23, 1942	Jan. 30, 1943
Iran	Apr. 8, 1943	[4]
Iceland	Aug. 27, 1943	Nov. 19, 1943

[1] The duty concessions and certain other provisions of this agreement ceased to be in force as of Mar. 10, 1938.
[2] The operation of this agreement was suspended as of Apr. 22, 1939.
[3] Superseded by supplementary agreement signed Dec. 13, 1940.
[4] Thirty days after exchange of proclamation (by the President of the United States) and ratification (by the National Assembly of Iran).

Summaries of the provisions of each individual agreement are published in FOREIGN COMMERCE WEEKLY promptly after signing. Complete files of the official analysis of each of the agreements, as well as the summaries published by this Department, are available for examination at all field offices of the Department of Commerce. Copies of such analyses or summaries for any particular agreement, figures for the United States trade with "Agreement Countries," and general information regarding the aims, procedure, and operation of the Reciprocal Trade Agreements Program may be obtained from the Trade Agreements Unit of the Bureau of Foreign and Domestic Commerce at Washington.

[A compilation of all changes in the import duties of the United States since the passage of the Tariff Act of 1930, including all duty reductions or bindings by the United States under the trade agreements signed to date, arranged by schedules and paragraphs of the Tariff Act has been prepared by the U. S. Tariff Commission in the form of a pamphlet. This is obtainable from the Superintendent of Documents, Washington 25, D. C., for 25 cents per copy.]

Countries With Which Intention To Negotiate Has Been Announced

Country	Date of issuance of notice	Latest date for submitting written statements	Date for oral presentation of views
Bolivia	Apr. 4, 1942	May 4, 1942	May 18, 1942
Paraguay	June 23, 1943	July 23, 1943	Aug. 4, 1943

[Detailed information, trade figures, and copies of the lists of products to which the United States announced it would give consideration for concessions, at the time of giving formal notice of intention to negotiate with each of the above countries, are available upon request to the Trade Agreements Unit, Bureau of Foreign and Domestic Commerce, or any of the field offices of the Department of Commerce, as well as from the Committee for Reciprocity Information or the Department of State.]

NOTE.—The above Trade Agreements Calendar will appear, for the present, in the issue nearest the middle of the month of FOREIGN COMMERCE WEEKLY, instead of each week as formerly.

The Mexican Department of Health and Public Welfare is planning construction of small hospitals and medical centers throughout the nation, to provide necessary health services to the remotest parts of the Republic. Each unit will have 100 beds and will cost approximately 100,000 pesos, or roughly $20,000.

Announcements Under the Reciprocal Trade Agreements Act

Lapse of Agreements With Haiti and the Dominican Republic Relative to Reciprocal Concessions in the Haitian-Dominican Commercial Treaty

(Department of State Release No. 94, March 27, 1944)

In notes exchanged between the United States and Haiti and the United States and the Dominican Republic during 1942, the United States agreed not to claim the benefit of reductions in customs duties granted by Haiti and the Dominican Republic to each other on a restricted number of products specifically provided for in the Haitian-Dominican commercial treaty signed on August 26, 1941.

That commercial treaty expired on March 24, 1944, and in consequence thereof the above-mentioned agreements in the notes exchanged by the United States and Haiti and the Dominican Republic automatically lapsed on the same date. These notes were exchanged between the United States and Haiti on February 16 and 19 and on April 25, 1942, and between the United States and the Dominican Republic on November 14, 1942.

Scrap paper, collected in Estonia by the National Relief Organization and by an organization established especially for that purpose, is practically the only raw material now available to Estonian cellulose factories. Imports of timber from German-occupied Russian territories had all but ceased as long ago as mid-December, states the Axis-controlled press.

Latin American Exchange Rates

NOTE.—Averages are actual selling rates for sight drafts on New York, in units of foreign currency, per dollar, with the following exception: Cuba—United States dollars to the peso. The peso of the Dominican Republic, the Guatemalan quetzal and the Panamanian balboa are linked to the dollar at 1 to 1; the Haitian gourde is fixed at 5 gourdes to 1 dollar.

Country	Unit quoted	Type of exchange	Average rate			Latest available quotation		
			1942 (annual)	1943 (annual)	Jan. 1944 (monthly)	Rate	Approximate equivalent in U. S. currency	Date
Argentina	Paper peso	Official A	3.73	3.73	3.73	3.73	$0.2681	Feb. 12, 1944
		Official B	4.23	4.23	4.23	4.23	.2364	Do.
		Bid	4.94	4.94	4.94	4.94	.2024	Do.
		Free market		4.06	3.99	3.99	.2506	Do.
Bolivia	Boliviano	Controlled	46.46	42.91	42.42	42.42	.0236	Mar. 11, 1944
		Curb	49.66	45.42	46.65	50.00	.0200	Do.
Brazil	Cruzeiro [1]	Official	16.50	16.50	16.50	16.50	.0606	Jan. 31, 1944
		Free market	19.64	19.63	19.63	19.63	.0509	Do.
		Special free market	20.52	20.43	20.30	20.30	.0493	Do.
Chile	Peso	Official	19.37	19.37	19.37	19.37	.0516	Mar. 11, 1944
		Export draft	25.00	25.00	25.00	25.00	.0400	Do.
		Curb market	31.75	32.37	31.70	31.50	.0317	Do.
		Free	31.13	31.00	31.00	31.00	.0323	Do.
		Gold exchange	31.13	31.00	31.00	31.00	.0323	Do.
		Mining dollar	31.13	31.00	31.00	31.00	.0323	Do.
		Agricultural dollar	31.13	31.00	31.00	31.00	.0323	Do.
Colombia	do	Controlled	1.75	1.75	1.75	1.75	.5714	Do.
		Bank of Republic	1.76	1.76	1.76	1.76	.5682	Do.
		Stabilization Fund	[2]	[2]	[2]	[2]	[2]	Do.
		Curb	1.77	1.76	1.75	1.75	.5714	Do.
Costa Rica	Colon	Uncontrolled	5.71	5.65	5.64	5.64	.1770	Feb. 29, 1944
		Controlled	5.62	5.62	5.62	5.62	.1779	Do.
Cuba	Peso	Free	1.00	1.00	1.00	1.00	1.0000	Jan. 29, 1944
Ecuador	Sucre	Central Bank (official)	14.39	14.10	14.10	14.10	.0709	Do.
Honduras	Lempira	Official	2.04	2.04	2.04	2.04	.4902	Jan. 31, 1944
Mexico	Peso	Free	4.85	4.85	4.85	4.85	.2062	Do.
Nicaragua	Cordoba	Official	5.00	5.00	5.00	5.00	.2000	Mar. 11, 1944
		Curb		5.16	5.28	5.25	.1905	Do.
Paraguay	Paper peso	Official	333.00	[4] 333.00	333.00	333.00	.0030	Nov. 7, 1943
	Guarani [5]	do		3.10	3.10	3.10	.3226	Feb. 29, 1944
Peru	Sol	Free	6.50	6.50	6.50	6.50	.1528	Mar. 11, 1944
Salvador	Colon	do	2.50	2.50	2.50	2.50	.4000	Jan. 31, 1944
Uruguay	Peso	Controlled	1.90	1.90	1.90	1.90	.5263	Mar. 11, 1944
		Free	1.90	1.90	1.90	1.90	.5263	Do.
Venezuela	Bolivar	Controlled	3.35	3.35	3.35	3.35	.2985	Feb. 29, 1944
		Free	3.45	3.35	3.35	3.35	.2985	Do.

[1] Under law of October 6, 1942, the cruzeiro became the unit of currency, replacing the milreis. Since November 1, 1942, exchange quotations have been in terms of cruzeiros and centavos to the dollar.
[2] For class 2 merchandise, 1.795; class 3, 1.87; class 4, 1.95.
[3] For class 2 merchandise, 1.765; class 3, 1.775; class 4, 1.785.
[4] Used until November 7, when the paper peso was replaced by the guarani.
[5] New currency unit instituted as of November 8, 1943.

NOTE.—Special rates apply to automotive equipment and agricultural machinery imported from the United States into Argentina.

New Books and Reports

★The following publications, added to the Department's research facilities, through the courtesy of the authors and publishers, are listed as a service to businessmen. *Please note:* The Department has no copies of private publications for distribution and cannot be responsible for their content. For private publications, write direct to the publishing agency given in each case.

Articles of Current Interest Appearing in the Department of State Bulletin March 25, 1944

Copies of this publication, which is issued weekly by the Department of State, may be obtained from the Superintendent of Documents, Government Printing Office, Washington, D. C., for the price of 10 cents each; subscription price $2.75 a year. The March 25 issue contains these articles:

BASES OF THE FOREIGN POLICY OF THE UNITED STATES.
PHILIPPINE INDEPENDENCE: STATEMENT BY THE PRESIDENT.
WAR REFUGEES: STATEMENT BY THE PRESIDENT.
GERMAN INVASION OF HUNGARY: STATEMENT BY THE SECRETARY OF STATE.
FALSE RUMORS OF POSSIBLE FUTURE COLLABORATION BETWEEN THE UNITED STATES AND THE VICHY REGIME.
DUTIES AND OBLIGATIONS OF AMERICAN CITIZENSHIP: ADDRESS BY ASSISTANT SECRETARY BERLE.
WATER TREATY BETWEEN THE UNITED STATES AND MEXICO: ARTICLE BY CHARLES A. TIMM.
INTERRUPTION OF OPERATIONS IN ARGENTINA OF ALL-AMERICAN CABLES, INC.
CONFERENCE OF ALLIED MINISTERS OF EDUCATION IN LONDON.
HALIBUT FISHERY REGULATIONS OF 1944.
INTER-AMERICAN INSTITUTE OF AGRICULTURAL SCIENCES.

Other Publications

INQUIRY REFERENCE SERVICE. U. S. Department of Commerce, Bureau of Foreign and Domestic Commerce.

News by COUNTRIES

(Continued from p. 26)

Financial or holding-company stocks and Government and municipal loans also rose sharply. These increases are especially notable because during the year there was only a very slight increase in issued capital and the number of companies listed actually decreased.

Furthermore, from February 4, 1943, to February 3, 1944, the average yield on various classes of stocks declined appreciably. The average yield on the 40 leading gold-mining stocks fell from 8.12 percent to 6.20 percent; on 13 closely related holding-company stocks, from 4.98 to 4.76. The dividends of many prominent industrial stocks and colliery stocks dropped from 0.5 percent to 1 percent, also.

—Industrial Development in Mexico. November 1943. 42 pp.

—South American Organic Chemical Industry and Trade. February 1944. 10 pp.

—Canadian Post-War Commerical Policy: Prospects and Possibilities. March 1944. 32 pp.

Available gratis from: Bureau of Foreign and Domestic Commerce, Washington 25, D. C.

SCHEDULE B. STATISTICAL CLASSIFICATION OF DOMESTIC AND FOREIGN COMMODITIES EXPORTED FROM THE UNITED STATES AND REGULATIONS GOVERNING STATISTICAL RETURNS OF EXPORTS OF COMMODITIES. PART I: ALPHABETIC INDEX. U. S. Department of Commerce, Bureau of the Census. January 1, 1944. 271 pp. Price, 75 cents. Supersedes January 1, 1943, issue.

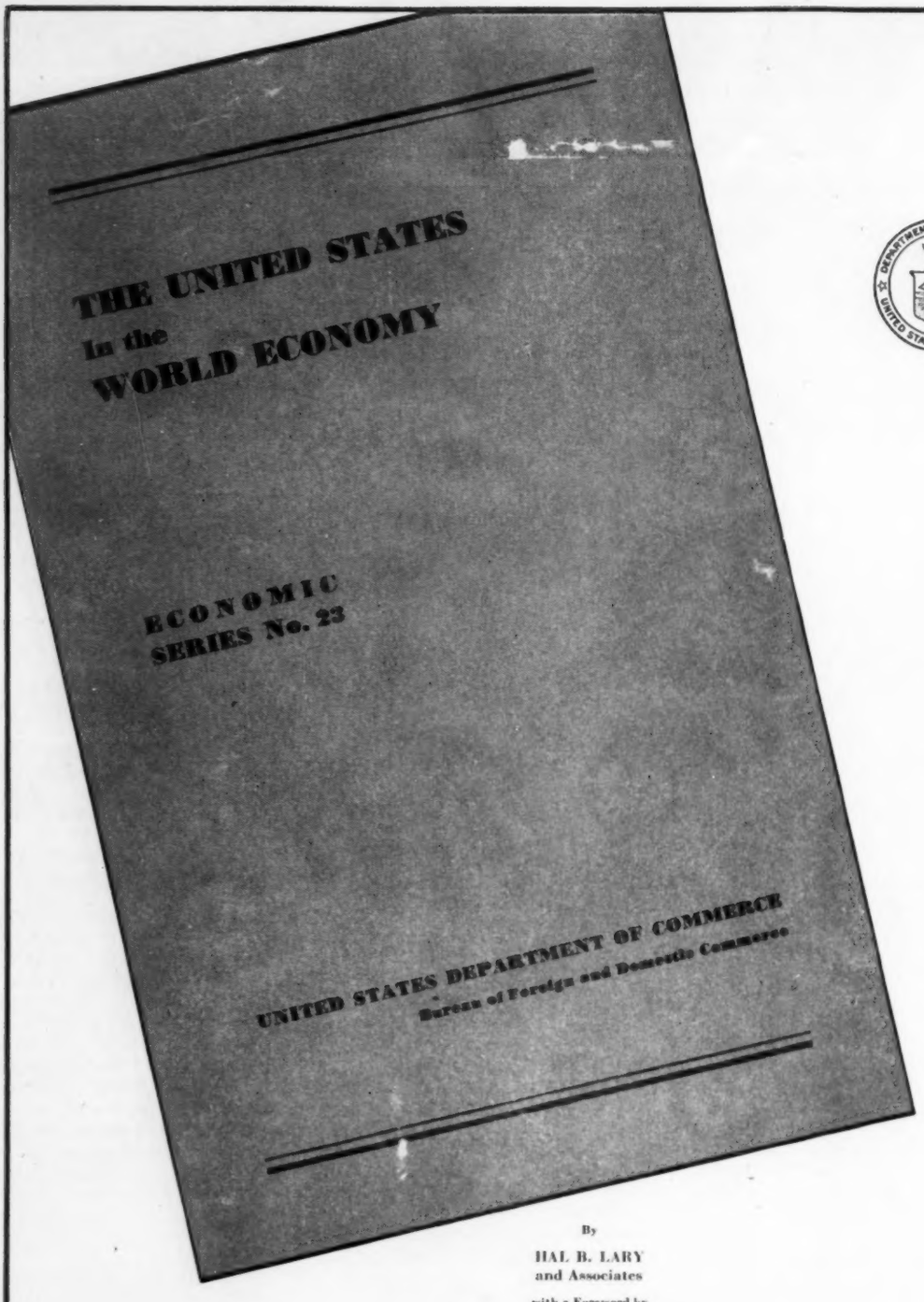
Available from: Superintendent of Documents, Washington 25, D. C.

GENERAL CENSUSES AND VITAL STATISTICS IN THE AMERICAS. U. S. Department of Commerce, Bureau of the Census and U. S. Library of Congress, Reference Department. 1943. 160 pp. Price, 20 cents. An annotated bibliography of the historical census and current vital statistics of the 21 American Republics, the American sections of the British Commonwealth of Nations, the American colonies of Denmark, France, and the Netherlands, and the American territories and possessions of the United States.

Available from: Superintendent of Documents, Washington 25, D. C.

ECONOMICS OF MILITARY OCCUPATION. Henry Simon Bloch and Bert F. Hoselitz. 1944. 153 pp. Price, $1.25. Presents and anlyzes certain economic problems which occur in connection with the changing aspects of a war of movement, and discussion of which is intended as a general guide to those who may come in contact with occupied territories. Separate sections consider military currency, exchange rates, banking, taxation, price control and rationing, and production control under military occupation.

Available from: The Foundation Press, Inc., 222 West Adams Street, Chicago, Ill.



By

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WAYNE C. TAYLOR, Under Secretary of Commerce

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